501 TA365: Time and Attendance Approvals

Web Based Training

Rev 08/23/2017

Welcome to Cardinal Training

This training provides participants with the skills and information necessary to use Cardinal and is not intended to replace existing Commonwealth and/or agency policies.

This course, and the supplemental resources listed below, are located on the Cardinal website (www.cardinalproject.virginia.gov) under Training. Cardinal Reports Catalogs are located on the Cardinal website under Resources:

- Instructor led and web based training course materials
- Job aids on topics across all functional areas
- Variety of simulations
- Glossary of frequently used terms

The Cardinal screenshots included in this training course show system pages and processes that some users may not have access to due to security roles and/or how specific responsibilities relate to the overall transaction or process being discussed.

For a list of available roles and descriptions, see the Statewide Cardinal Security Handbook on the Cardinal website in the Security section under Resources.

Course Objectives

After completing this course, you will be able to:

- Understand Time and Attendance concepts
- Recognize the difference between payable time and reported time
- Manage timesheet exceptions
- Approve or deny payable time and reported time via the worklist or direct navigation
- Identify who enters and approves extended leave
- Delegate approval items on your worklist

Agenda

1. Understanding Time and Attendance Approvals
2. Managing Exceptions
3. Approving and Denying Payable and Reported Time
4. Delegating Time and Attendance Items

Lesson 1: Introduction

1 Understanding Time and Attendance Approvals

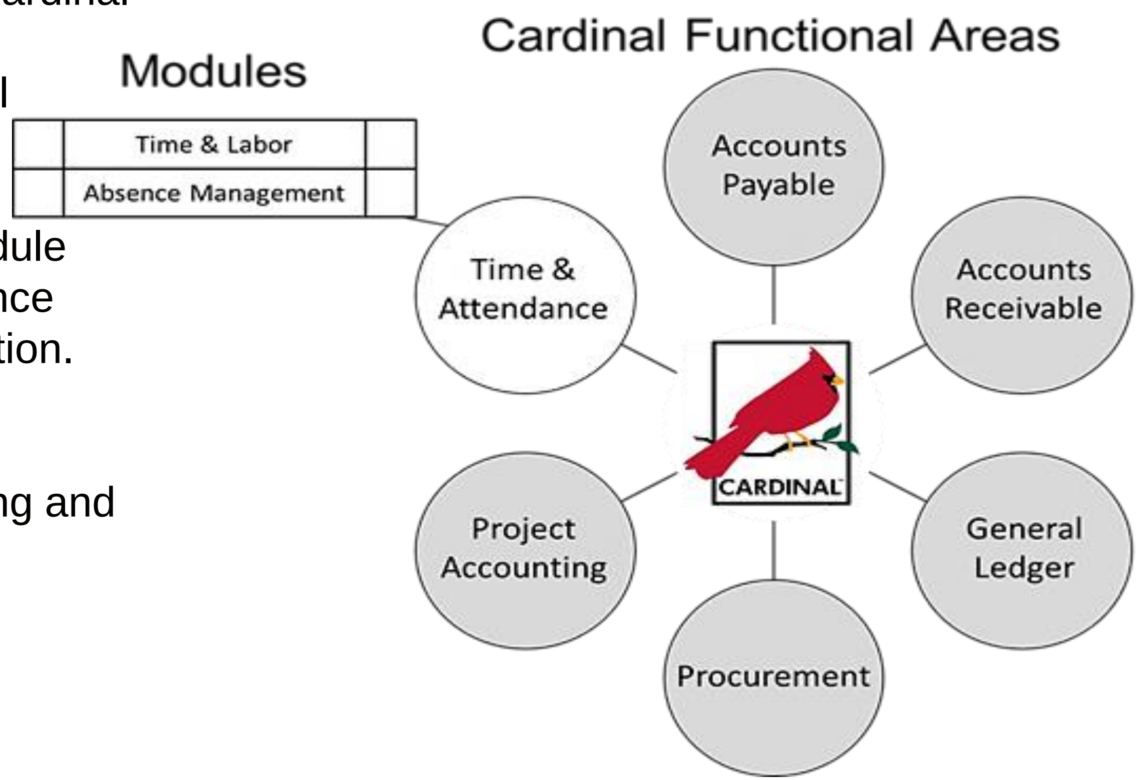
This lesson covers the following topics:

- Time and Attendance Overview
- Key Concepts
- Approval Overview

Time and Attendance Overview

Time and Attendance is the functional area in Cardinal that tracks employee time and absences. It is composed of two modules in the Human Capital Management (HCM) application:

- **Time and Labor:** The Time and Labor module includes employee setup, time and attendance tracking, payroll integration, and cost allocation.
- **Absence Management:** The Absence Management module includes the processing and management of employee absences.



Key Concepts

Some key concepts in approving Time and Attendance include:

- Absences entered in the **Absence** section of the **Timesheet** page are available for approval immediately upon submission.

- Time entered in the timesheet grid of the **Timesheet** page is not available for approval until it has been processed by Time Administration.

- System rules create exceptions (warnings or errors) for employee time that is entered and submitted but does not meet predefined business rules.

- There are three levels of severity exceptions: **High**, **Medium**, and **Low**. Only **High** severity exceptions prevent time from becoming payable time.

- Cardinal does not allow users to enter negative hours. However, when an employee makes an adjustment to payable time after it has been approved, the hours display as negative time on the approval page. You must approve those negative hours to avoid errors when the allocation process is run at the end of each pay period.

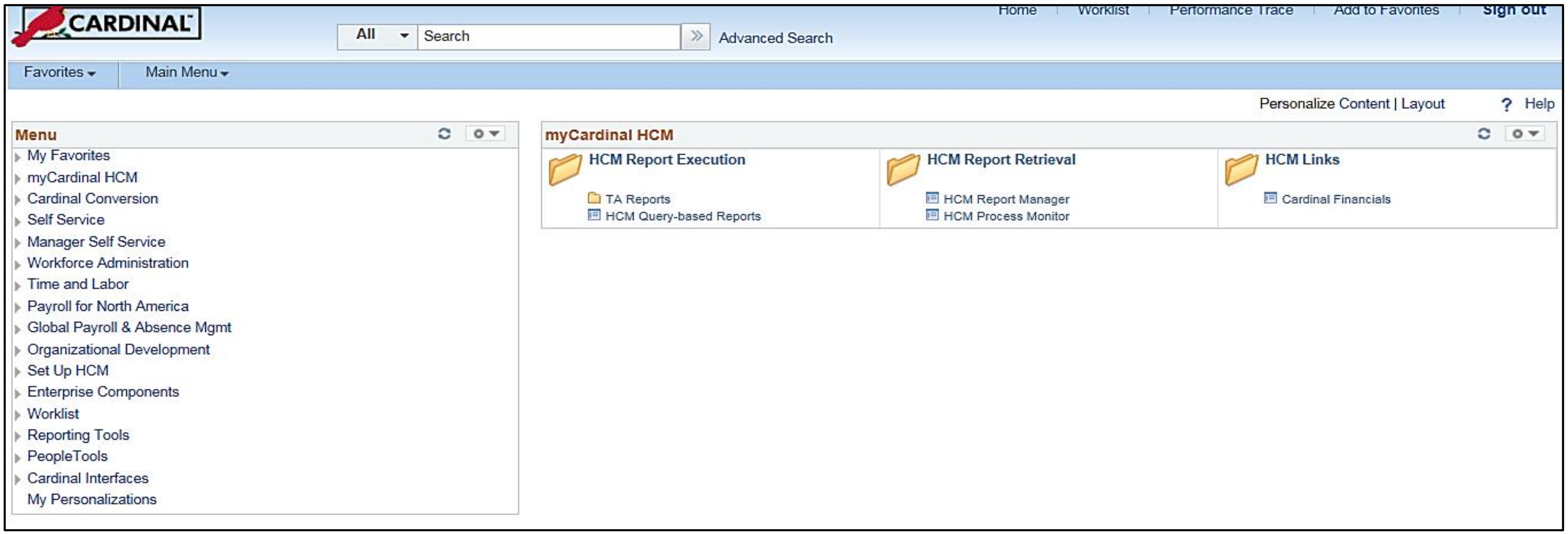
Approval Overview

Time and Attendance records time and absences for employees (Time Reporters).

All Time and Attendance approvals are completed in the **Cardinal HCM** (Human Capital Management) application.

To access **Cardinal HCM**:

- Log Into Cardinal.
- From the main page (**myCardinal Financials**), click the **Cardinal HCM** link.



Approval Overview (continued)

Two types of time are approved in Cardinal:

- **Payable Time:** Includes both productive and non-productive time reported in the Weekly grid that has been successfully processed. Time entered in this section of the timesheet may include regular hours worked as well as other types of hours that the employee may earn, such as Compensatory and Overtime Leave (either earned or taken), etc. that are associated with productive time.

- **Reported Time:** Includes time reported in the Absence Events section of the timesheet, and may include Vacation, Civil Leave, Leave Without Pay, etc. Reported Time Leave types are defined by DHRM (Commonwealth's Department of Human Resource Management). Unlike the Payable Time leave that is earned for productive hours worked, Reported Time leave is not associated with productive time.

Payable Time (associated with productive time) and **Reported Time** (Absences)**,** in general, require one level of approval.

Payable Time Approval List

Payable time is reported in the timesheet grid under the Weekly section of the **Timesheet**, and includes hours associated with productive time:

- Office Closing
- Called Out Exempt
- Actual Hours Called Out
- Compensatory Leave Earned or Taken
- Emergency Comp Earn
- Emergency OT @ Time ½ - Salary or Hourly
- Emergency OT Leave
- Emergency Regular – Hourly
- Emergency Straight Time OT – Salary
- Holiday – Floating
- No Holiday Pay
- Pre-Approved On-Call Hours
- OT @ Straight Time – Salary
- OT @ Time ½ - Salary or Hourly
- Overtime Leaved Earned or Taken
- Regular Earnings – Hourly or Salary
- Regular Time LTD Working or STD Working
- Uncompensated Overtime

Reported Time Approval List

Reported Time (absences) is reported in the **Absence Events** section of the **Timesheet** and includes:

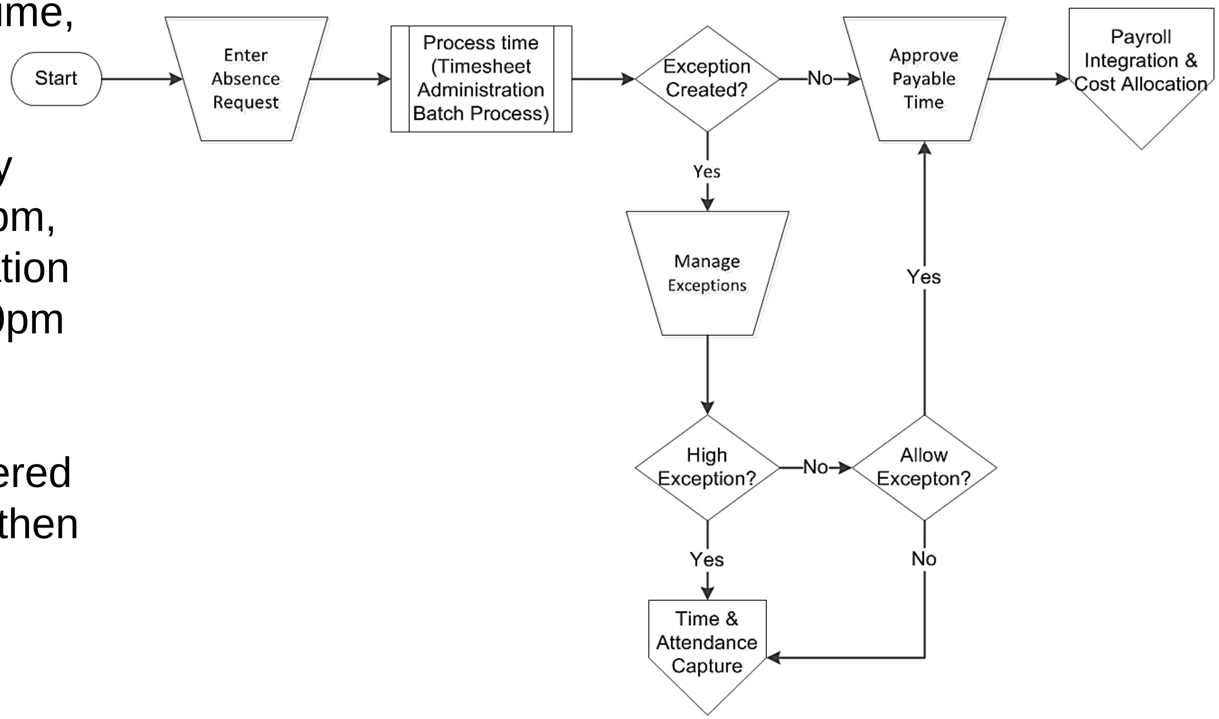
- Family Medical Leave
- Leave Without Pay
- Military Bank Leave, Leave, Physical, or Leave Disaster
- VSDP Personal Leave
- Public Health Emergency
- Pre-Layoff Leave
- Sick Leave
- VSDP Sick Leave
- Vacation
- Worker’s Compensation (Day of Injury)
- Civil Leave
- Annual Leave Incentive
- Volunteer Service Leave
- Donated Leave
- Victim of Disaster
- Education Leave w/Pay or w/o Pay
- Emergency Service Volunteer
- Emergency Preparation Time
- Employee Recognition Program
- Employee Suggestion Program

Submitted Time Approval Routing

Time entered and submitted in the timesheet grid goes through the Time Administration batch process. This process uses various time reporting rules to validate time entered in the timesheet grid to determine if the time entered on the timesheet grid (regular, overtime, etc. hours) can be made payable time.

The Time Administration process runs periodically throughout the day (8am, 10am, 12noon, 2pm, 4pm, and 6:30pm weekdays, except on salaried allocation days when it is run as scheduled at 8am and 6:30pm and possibly ad hoc between those times).

Once it passes Time Administration, the time entered in the Timesheet grid becomes Payable Time. It then routes to the employee's supervisor for approval.



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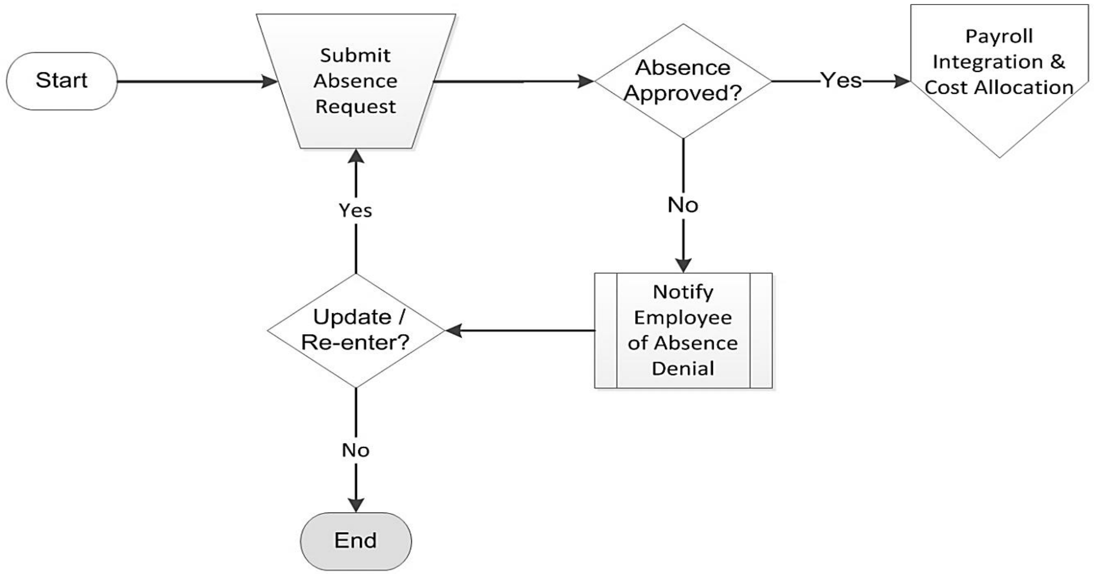
Submitted Time Approval Routing (continued)

Absences are entered in the absence grid on the **Timesheet** page in the **Absence Events** section. Once the Time Reporter clicks the **Submit** button, absence requests route for approval immediately as reported time.

Approvers are notified of reported time (absences) and payable time associated with productive time that needs approval through their worklist. The employee's supervisor can approve or deny payable time and reported time.

- Cardinal does not send an e-mail to the person that entered the request when payable time and reported time are approved.

- If denied, Cardinal sends a notification e-mail to the person who entered the request.



Lesson 1: Summary

1 Understanding Time and Attendance Approvals

In this lesson, you learned:

- Key concepts related to Time and Attendance approvals
- The difference between reported and payable time
- How payable and reported time route for approval

Lesson 2: Introduction

2 Managing Exceptions

This lesson covers the following topics:

- Exception Overview
- Accessing the Exceptions Page
- Viewing Exceptions
- Identifying and Correcting Exceptions
- Managing Exceptions

Exceptions Overview

Once time entered in the timesheet grid is submitted, the Time Administration process checks it against business rules. Time Administration runs periodically throughout the day.

The **Time Administration** process may identify:

- No exceptions: Submitted time becomes payable time with no exceptions.
- Low or medium severity exceptions: Submitted time becomes payable time with low or medium exceptions.
- High severity exceptions: Submitted time does not become payable time with a high severity exception. Once corrected, it is resubmitted through Time Administration and becomes payable time when successfully processed.

You must correct high severity exceptions in order for payable time to be generated.

Payable time is still generated when an exception is either low or medium, but should still be addressed to clear them out of Cardinal. If you do not correct them, they will remain as exceptions.

Accessing the Exceptions Page

You can view Exceptions for your employees directly from the timesheet under the **Reported Time Status** tab. An **Exception** icon displays for the week or date range of the timesheet display. Also, there is an **Exception** tab on the timesheet to view the Exception detail. You can also access the Timesheet Report to view Exceptions.

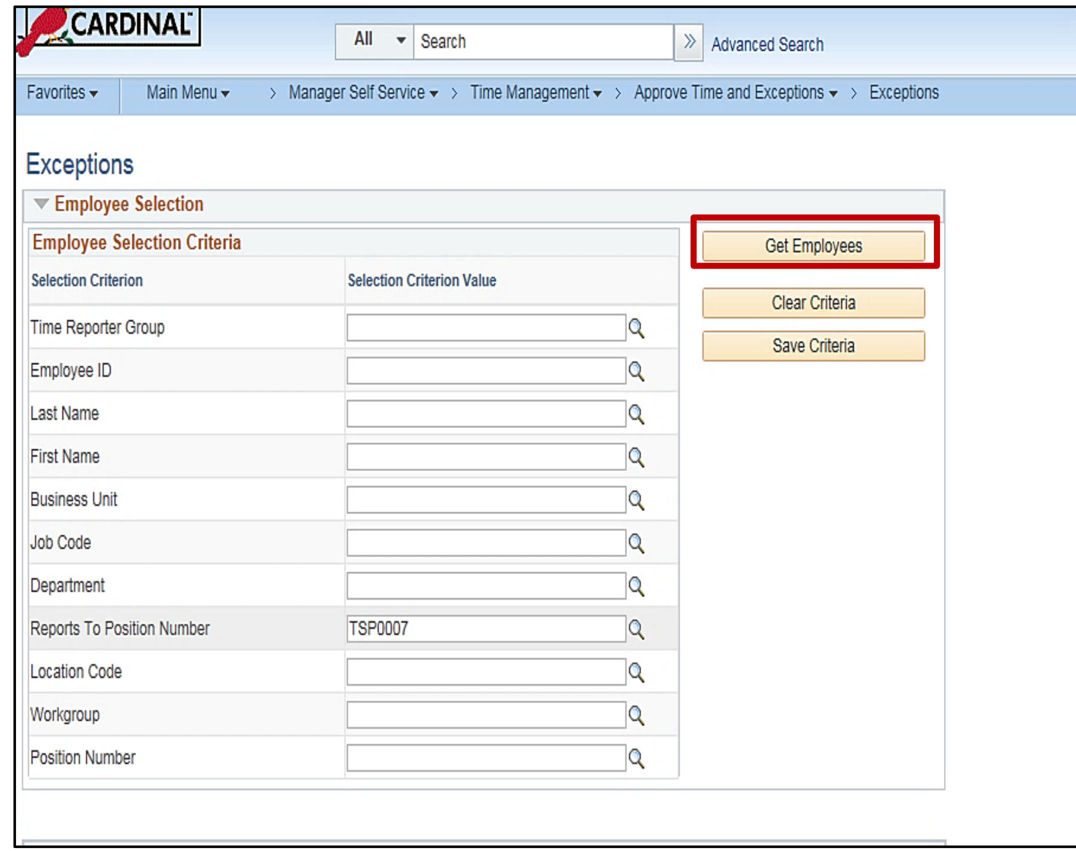
To view exceptions on the **Exceptions** page, navigate to the **Exceptions** page using the following path:

Cardinal Financials > Cardinal HCM > Main Menu > Manager Self Service > Time Management > Approve Time and Exceptions > Exceptions

This opens the **Exceptions** page.
To view exceptions:

- Enter your position number in the **Reports To Position Number** field.

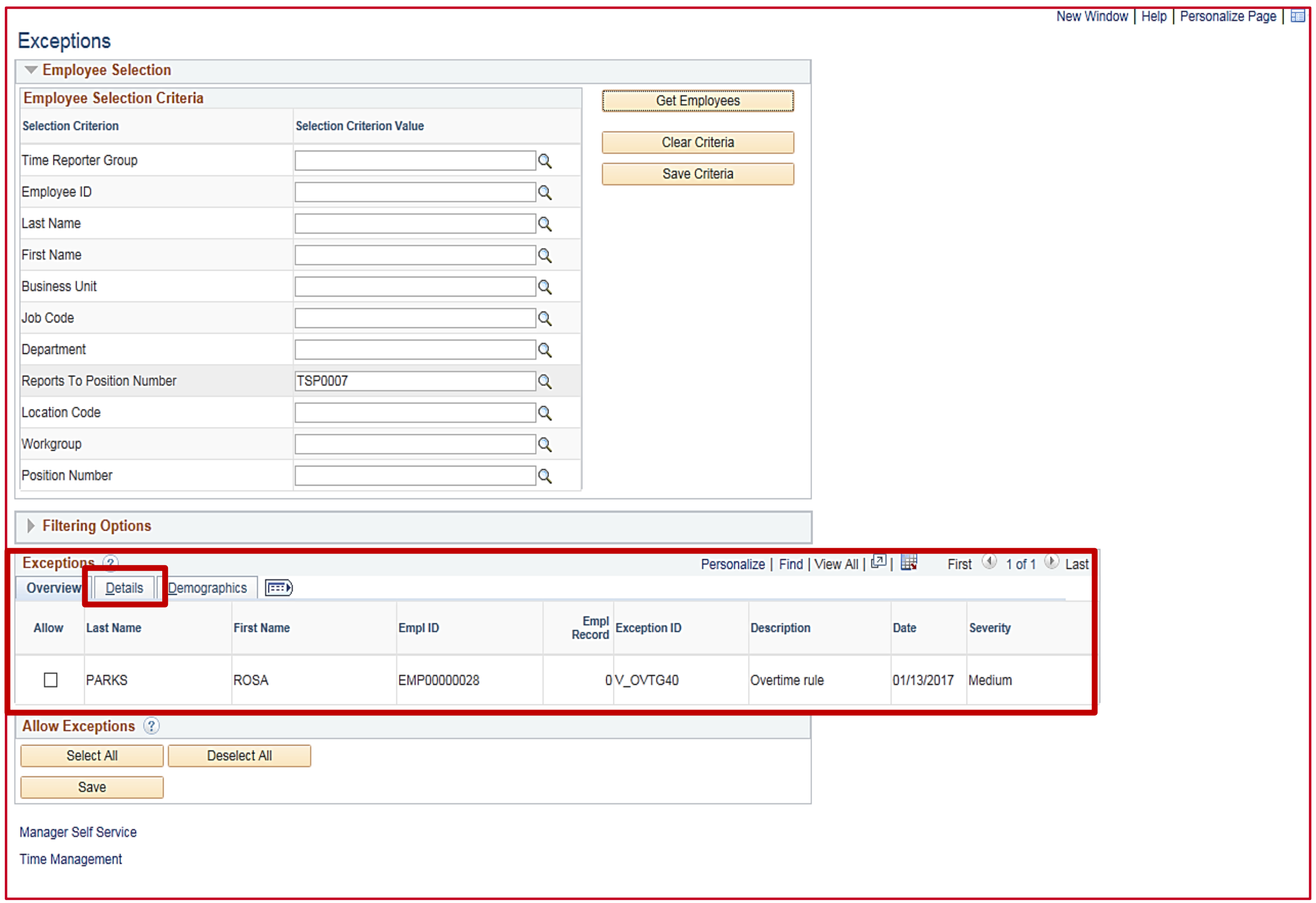
- Click the **Get Employees** button.



Viewing Exceptions

If you have employees with Exceptions (Low, Medium or High), they display under the **Exceptions** section at the bottom of the page.

To view the details about any exceptions, click the **Details** tab.



Viewing Exceptions (continued)

The **Details** page displays the **Exception ID** and a description along with a **Severity** level.

Exceptions

Overview | Details | Demographics

Allow	Last Name	First Name	Empl ID	Empl Record	Exception ID	Source	Last Updated	Exception Data
☐	OCONNOR	SANDRA	EMP00000027	0	V_OVTG40	Time Administration	02/02/2017 5:26:06PM	Employee has reported more than 40 hours (Regular, Overtime) for the week.
☐	OCONNOR	SANDRA	EMP00000027	0	V_OVTG40	Time Administration	02/02/2017 5:26:06PM	Employee has reported more than 40 hours (Regular, Overtime) for the week.
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☐	OCONNOR	SANDRA	EMP00000027	0	V_OVTG40	Time Administration	02/02/2017 5:26:06PM	Employee has reported more than 40 hours (Regular, Overtime) for the week.
☐	PARKS	ROSA	EMP00000028	0	V_OVTG40	Time Administration	02/02/2017 5:27:44PM	Employee has reported more than 40 hours (Regular, Overtime) for the week.

Identifying and Correcting Exceptions

The **Details** page provides more information:

Overview | Details | Demographics

Allow	Last Name	First Name	Empl ID	Empl Record	Exception ID	Source	Last Updated	Exception Data
☑	OCONNOR	SANDRA	EMP00000027	0	V_OVTG40	Time Administration	02/02/2017 5:26:06PM	Employee has reported more than 40 hours (Regular, Overtime) for the week.
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Exceptions of **High** severity must be corrected before Payable Time is Approved. Please go to the employee timesheet to correct the issue based on the exception message.

- **Allow** exception checkbox should only be checked if there truly is an exception to the exception; otherwise, the time should be corrected on the timesheet to satisfy the rule and the exception will automatically drop after the next run of Time Administration.

In the rare occasion where the Exception is allowed, click the **Allow** checkbox.

For more detailed information about clearing exceptions, see the job aid entitled **501 TA: Exceptions** located on the Cardinal website in **Job Aids** under **Training**.

Managing Exceptions

Once you correct an exception, Time Administration will re-process it the next time it runs, and clear it from the Exceptions list.

As a Supervisor, you should check for Exceptions at least weekly and take the appropriate actions to address any. It is your responsibility to ensure all exceptions have been addressed for your direct reports.

Lesson 1: Checkpoint

Now is your opportunity to check your understanding of the course material.

Read the question on the next slide(s), select answer(s) and click **Submit** to see if you chose the correct response.

The Time Administration Process processes payable time and identifies any exceptions on the Timesheet.

- ○ True
- ○ False

This type of Exception must be correctced in order for Payable Time to be generated.

- High Severity
- Low Severity
- Medium Severity

Lesson 2: Summary

2 Managing Exceptions

In this lesson, you learned:

- The Time Administration Process processes payable time and identifies any exceptions on the timesheet.
- Exceptions are classified as Low, Medium, or High severity. High severity exceptions must be corrected in order for Time Administration to process this time and, in general, will not be payable unless an approver corrects exceptions on the timesheet.
- Approvers could mark “allow” for Low and Medium severity exceptions. However, Approvers should examine these exceptions carefully as exceptions are a result of a processing rule violation. If at all possible, clear the exception by correcting the timesheet. If a Low or Medium exception is marked **Allow**, there is no further processing of the exception and it will pass through as payable time
- The Exceptions page lists Timesheet exceptions. For more detailed information about clearing exceptions, see the job aid entitled **501 TA: Exceptions** located on the Cardinal website in **Job Aids** under **Training**.

Lesson 3: Introduction

3 Approving and Denying Payable and Reported time

This lesson covers the following topics

- Approving Payable Time via the Worklist and direct navigation
- Approving Reported Time via the Worklist and direct navigation
- Denying Payable and Reported Time

Options for Approving Time

There are two options for approving payable and reported time:

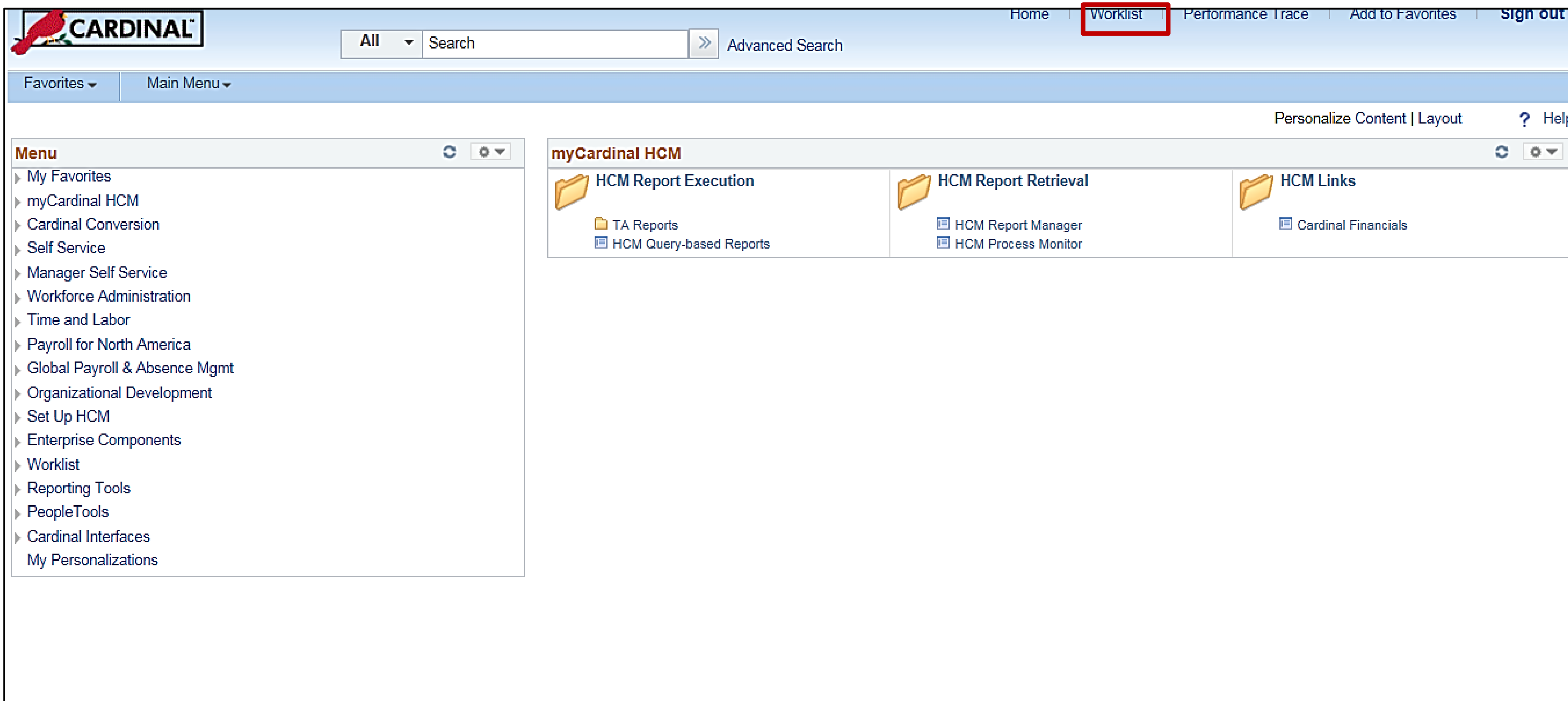
- Use the **Worklist** link – found at the top of the main **Cardinal HCM Home** page.

- Use the menu navigation path :
  - **Manager Self Service > Approve Time and Exceptions > Payable Time**
  - **Manager Self Service > Approve Time and Exceptions > Reported Time**

This lesson will show you the process steps using both methods.

Approving Time: Using the Worklist

To approve time using the worklist, click the **Worklist** link located at the top of the **Cardinal HCM Home** page.

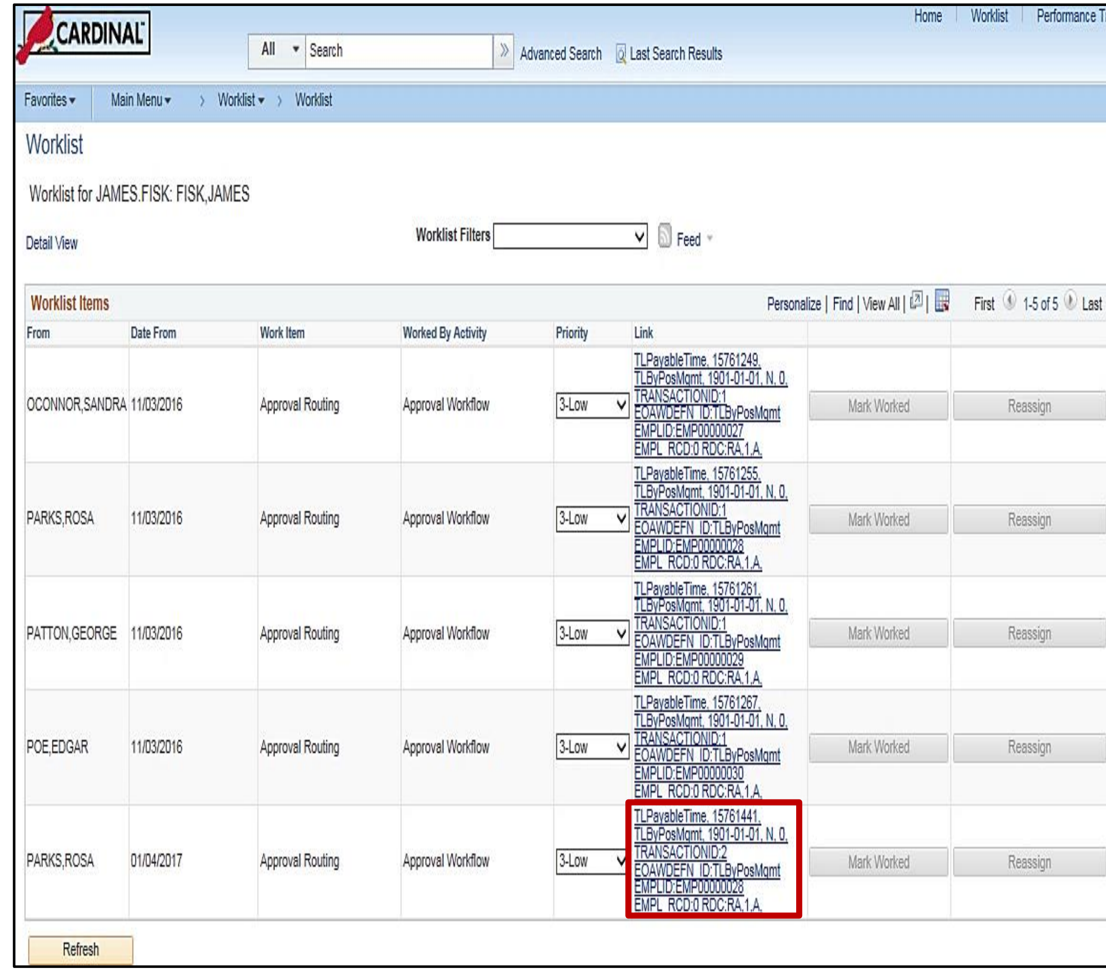


Approving Time: Using the Worklist (continued)

The **Worklist** page appears and displays any of your direct reports who have payable time or reported time (absences) that require approval.

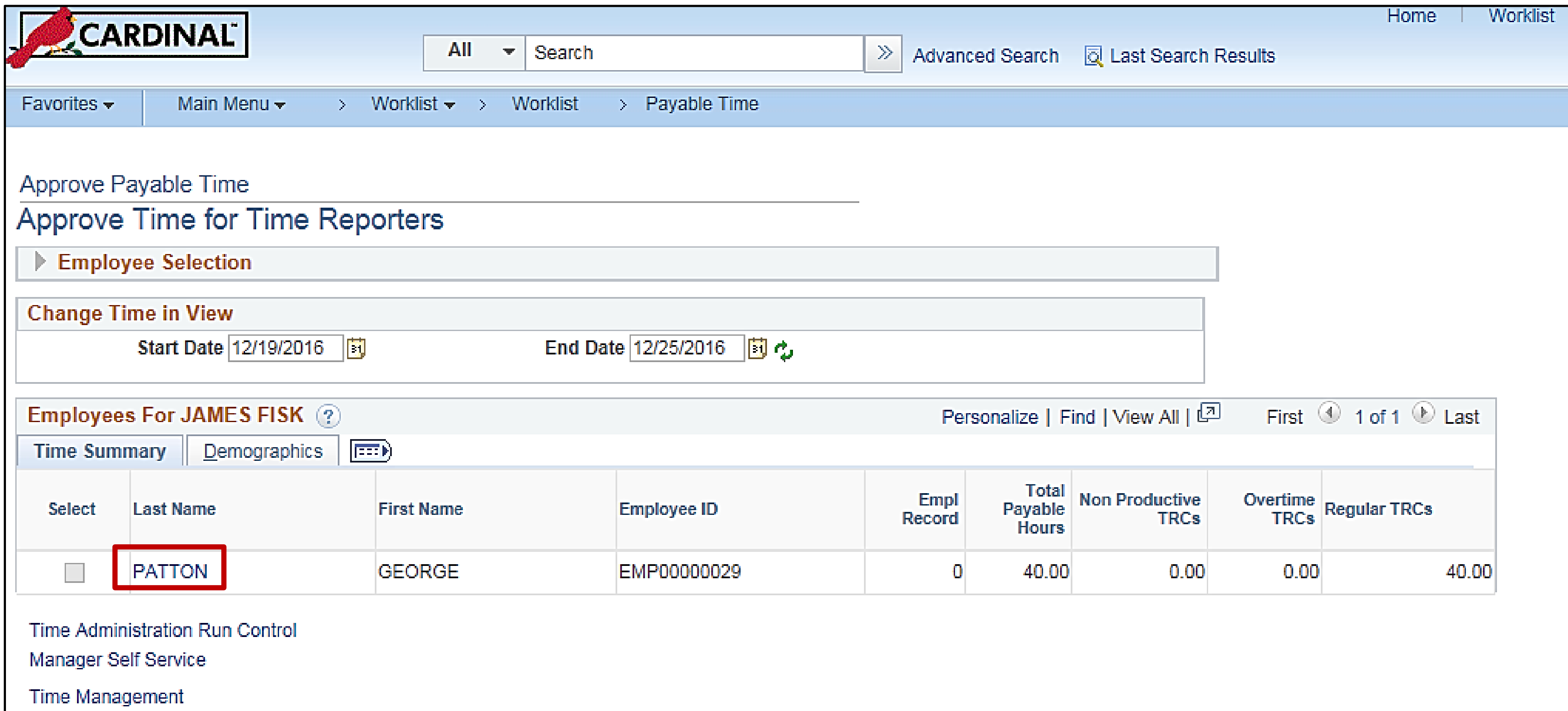
There are eight columns* on this page:

- **From:** Employee's name
- **Date From:** Date the time was submitted
- **Work Item:** Default is **Approval Routing**
- **Worked By Activity:** Default is **Approval Workflow**
- **Priority:** Defaults to **3 – Low**
- **Link:** Path to access the specific approval required
  - **Payable Time:** Starts with **TL_Payable Time**
  - **Reported Time:** Starts with **TL_Reported Time**
- The **Mark Worklist** and **Reassign** column buttons are not active.



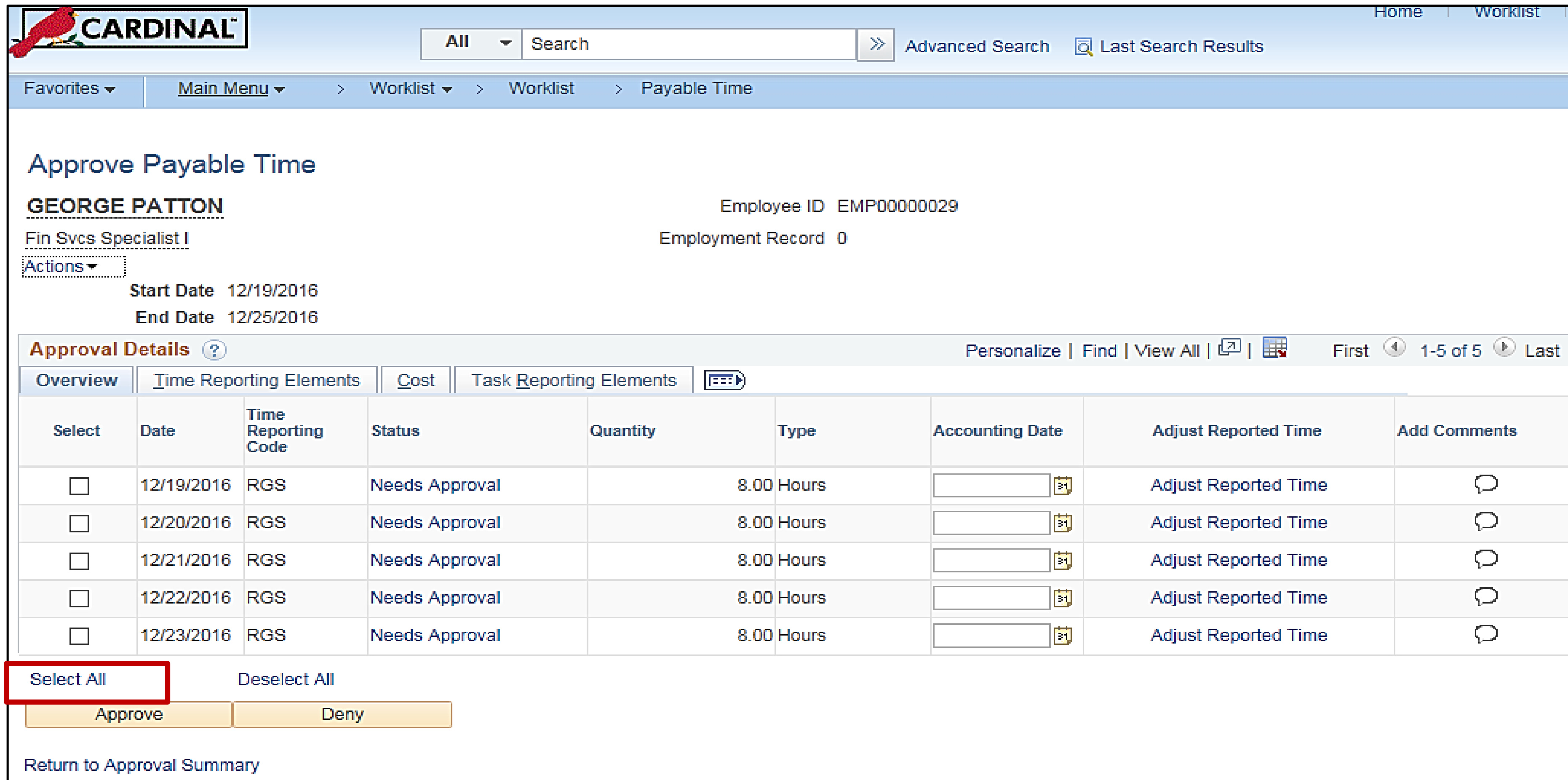
Approve Payable Time: Using the Worklist

From the **Worklist** link, click the **Last Name** link to access the **Approve Time for Time Reporters** page. Click the **Last Name** link for the employee.



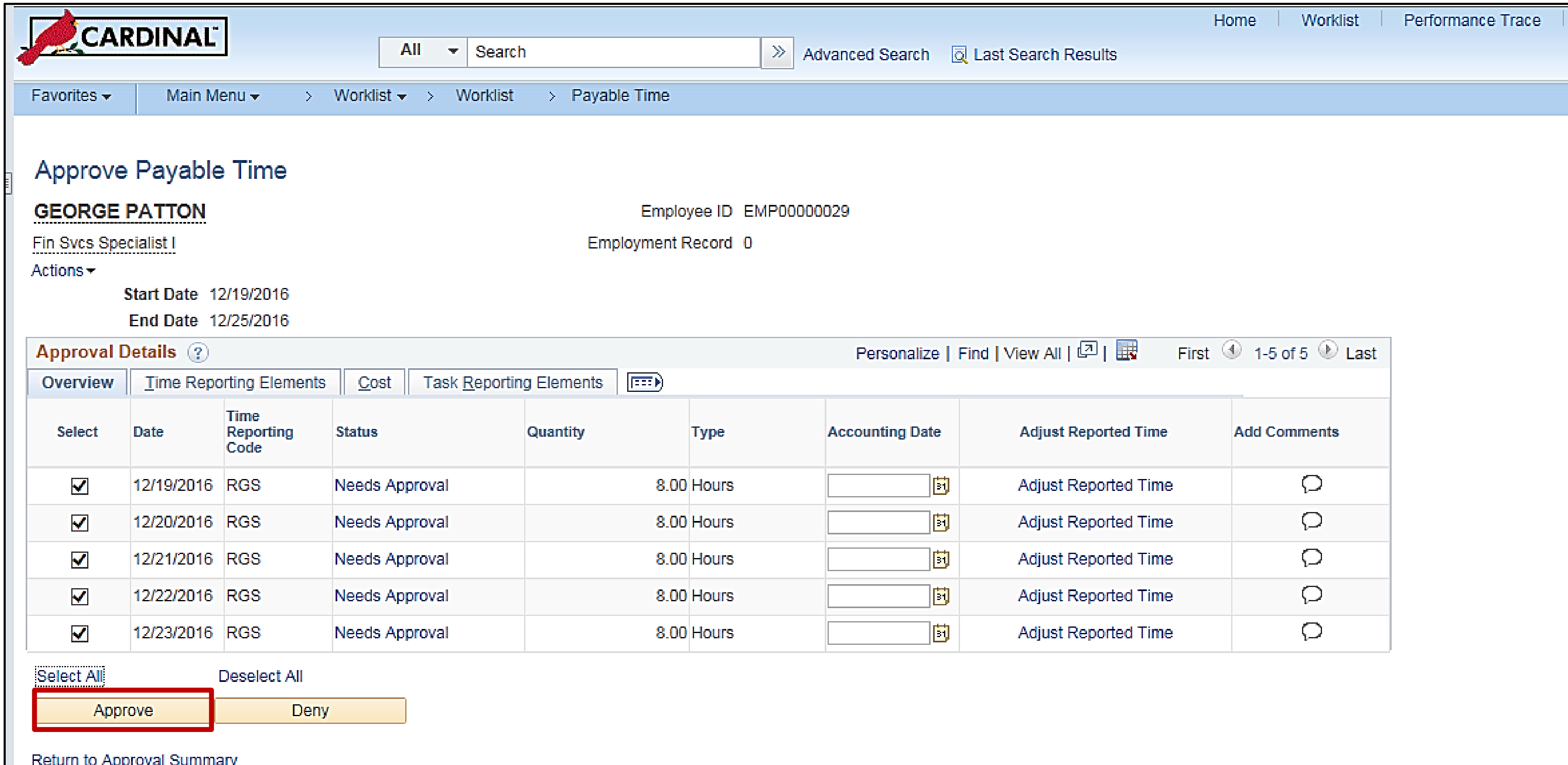
Approve Payable Time: Using the Worklist (continued)

From the **Approve Payable Time** page, you can select individual rows to **Approve** or **Deny** Payable Time. You can click the **Select All** to select all the rows.



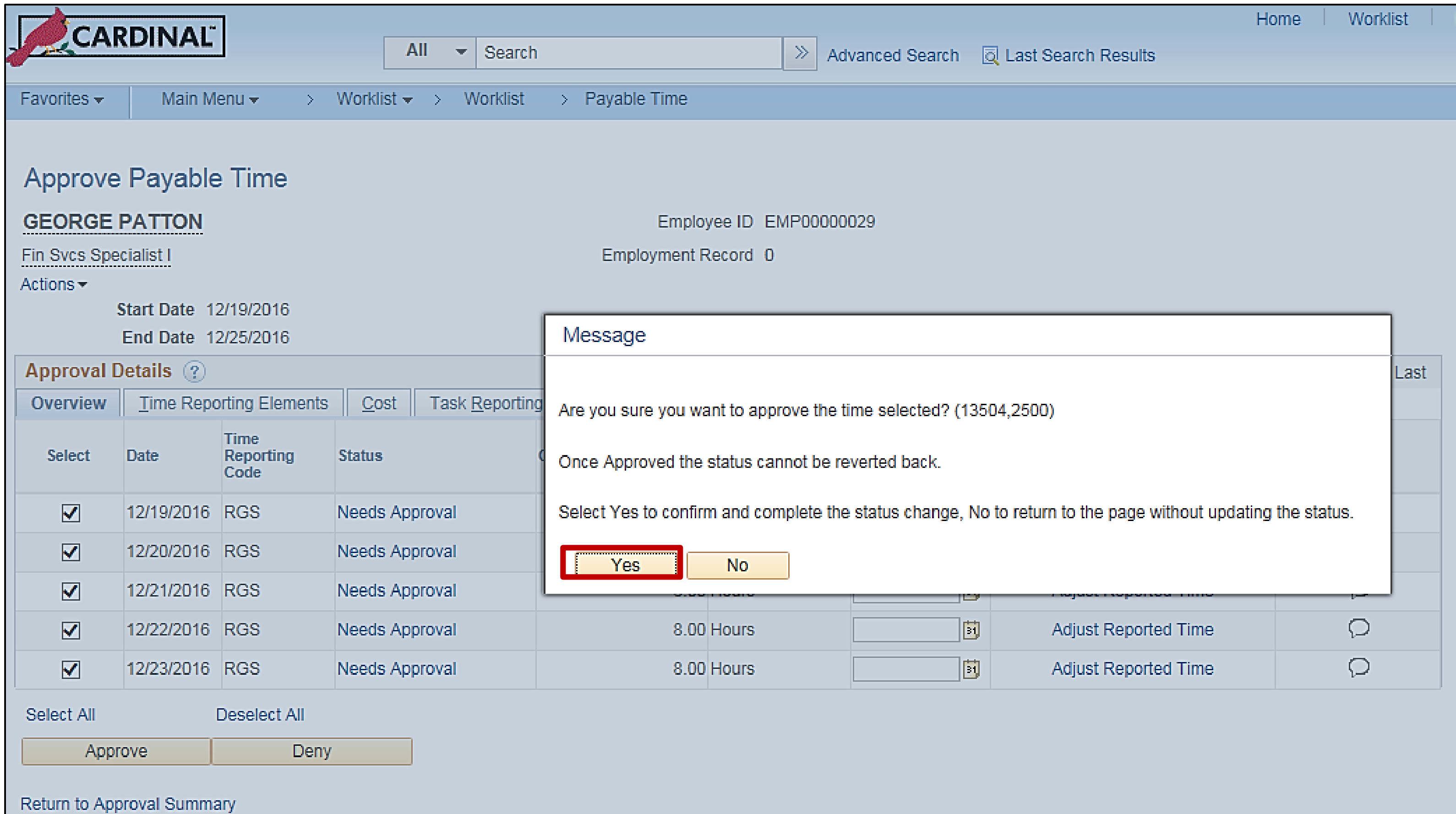
Approve Payable Time: Using the Worklist (continued)

Click the **Approve** button.



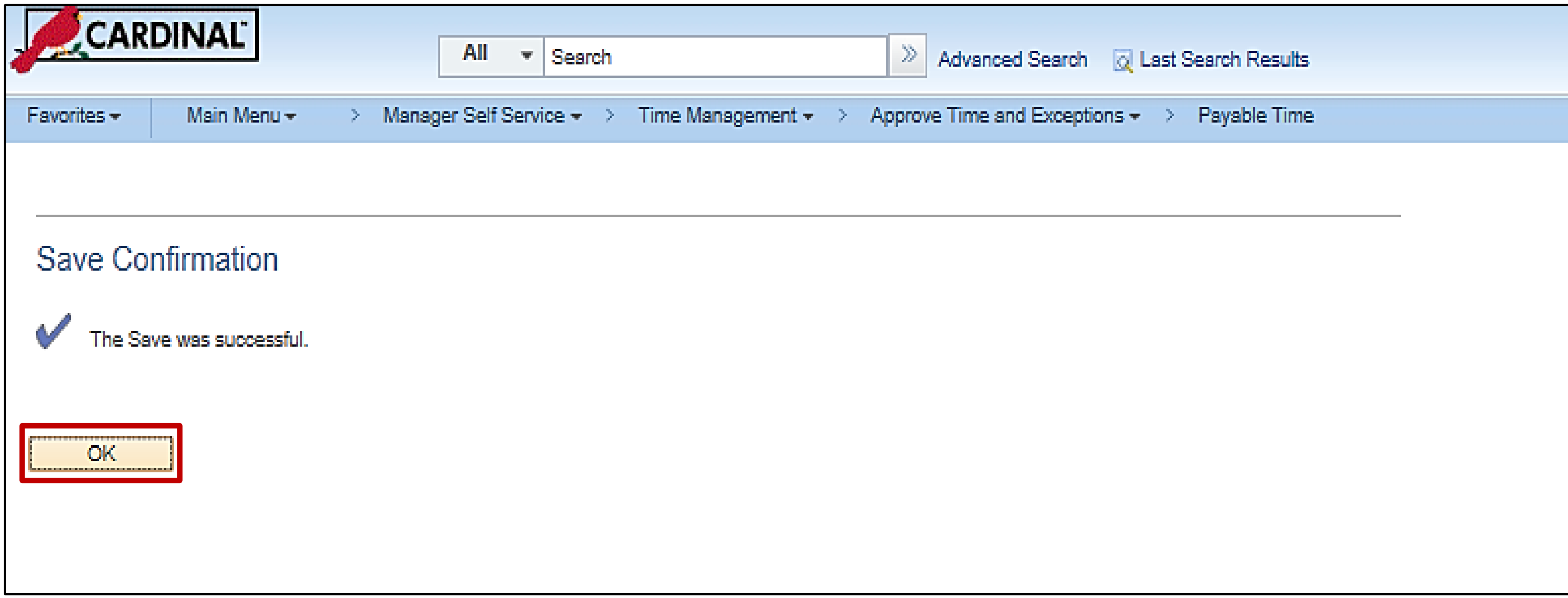
Approve Payable Time: Using the Worklist (continued)

A Message will pop up asking if you want to approve. Click the **Yes** button to confirm your review and approval.



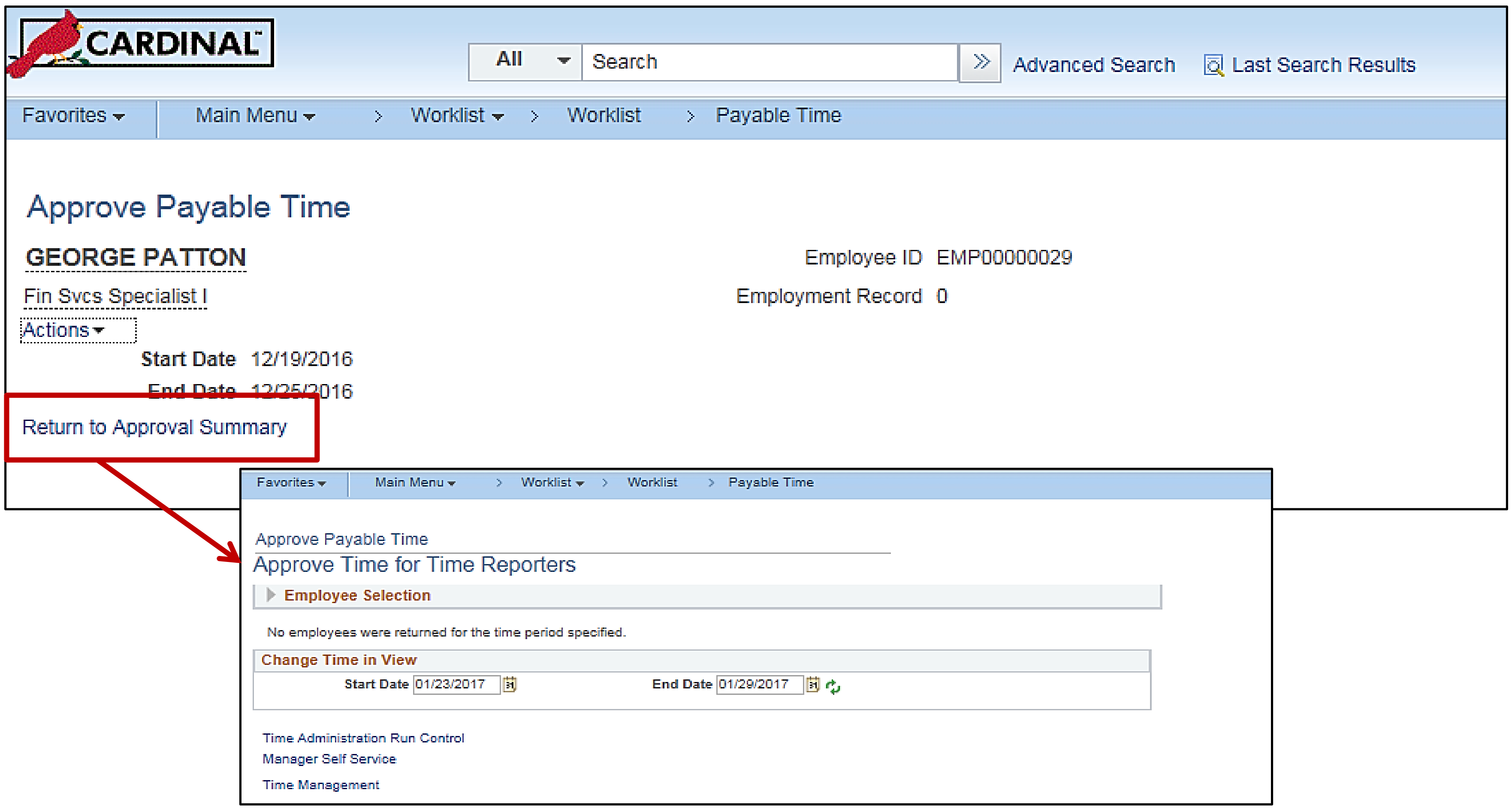
Approve Payable Time: Using the Worklist (continued)

Click the **OK** button on the **Save Confirmation** page.



Approve Payable Time: Using the Worklist (continued)

On the **Save Confirmation** page click the **Return to Approval Summary** link. The **Approve Time for Time Reporters** page displays with no further time to approve. Click the **Worklist** to continue to approve additional time for employees.

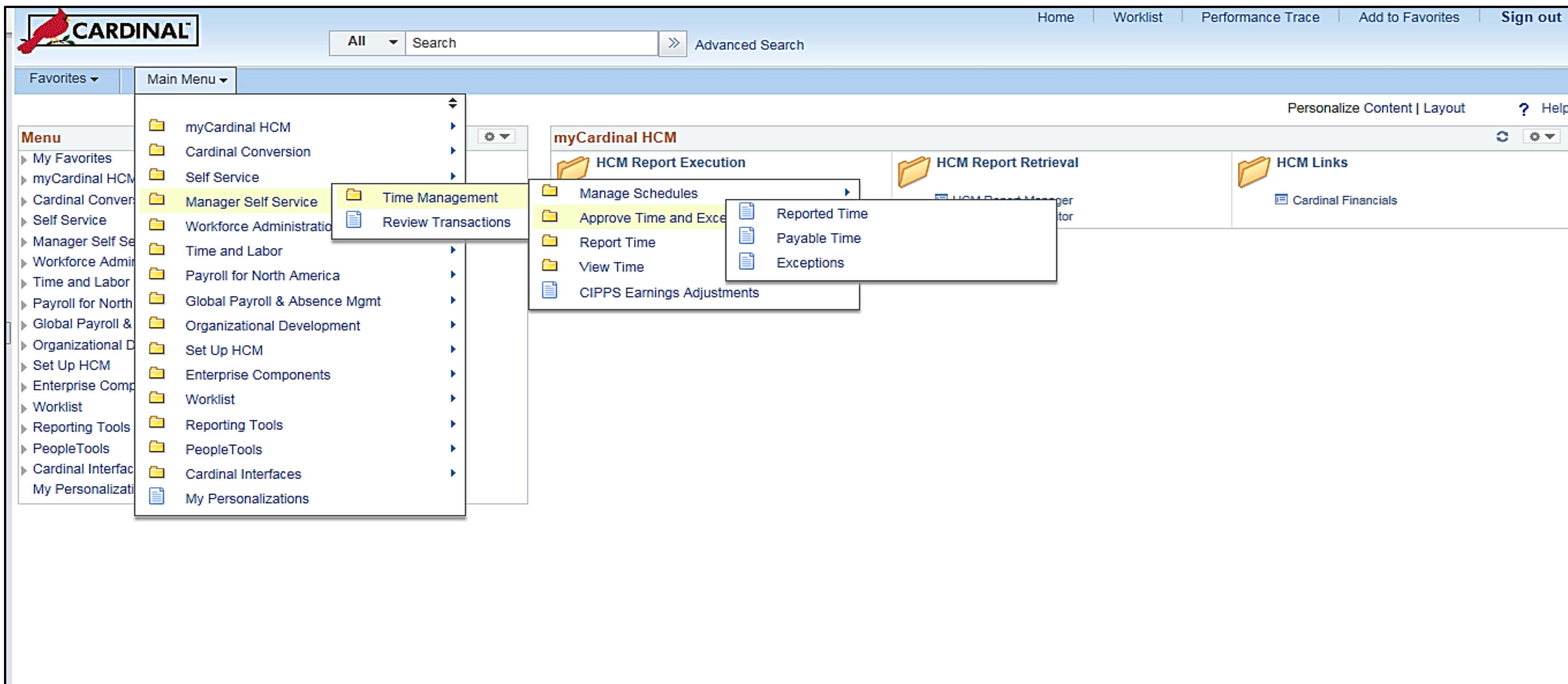


Approving Payable Time: Using Direct Navigation

You can also approve time by directly navigating to the **Approve Payable Time** page.

You can navigate to this page using the following path:

Main Menu > Manager Self Service > Time Management > Approve Time and Exceptions > Payable Time



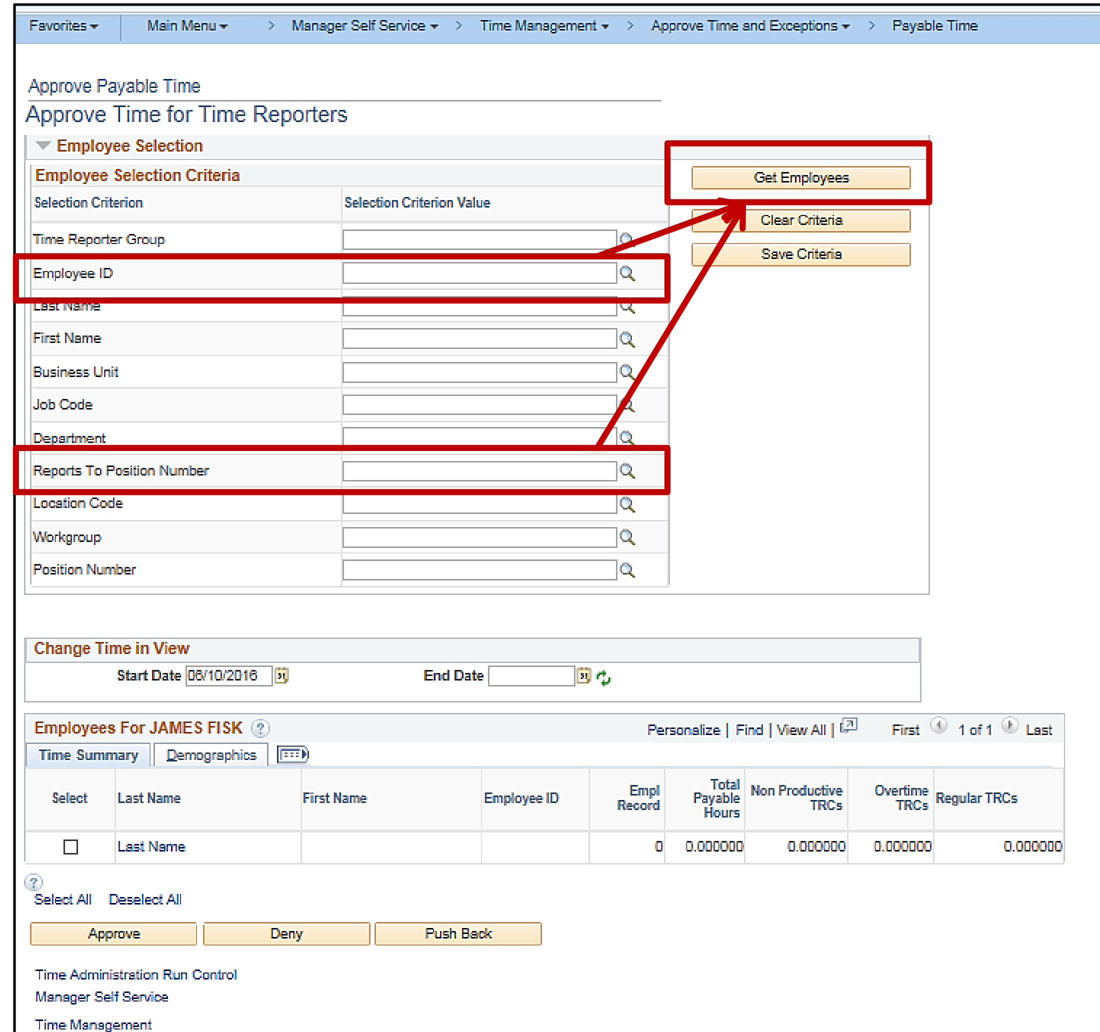
Approving Payable Time: Using Direct Navigation (continued)

The **Approve Payable Time** Search page displays.

To approve payable time, enter your search criteria:

- Enter your position number in **Reports to Position Number** field to select all Time Reporters reporting to your Position number who have payable time needing approval.
- Click the **Get Employees** button.

You can check on a specific employee's payable time, by entering the employee's **Employee ID** as your search criteria.



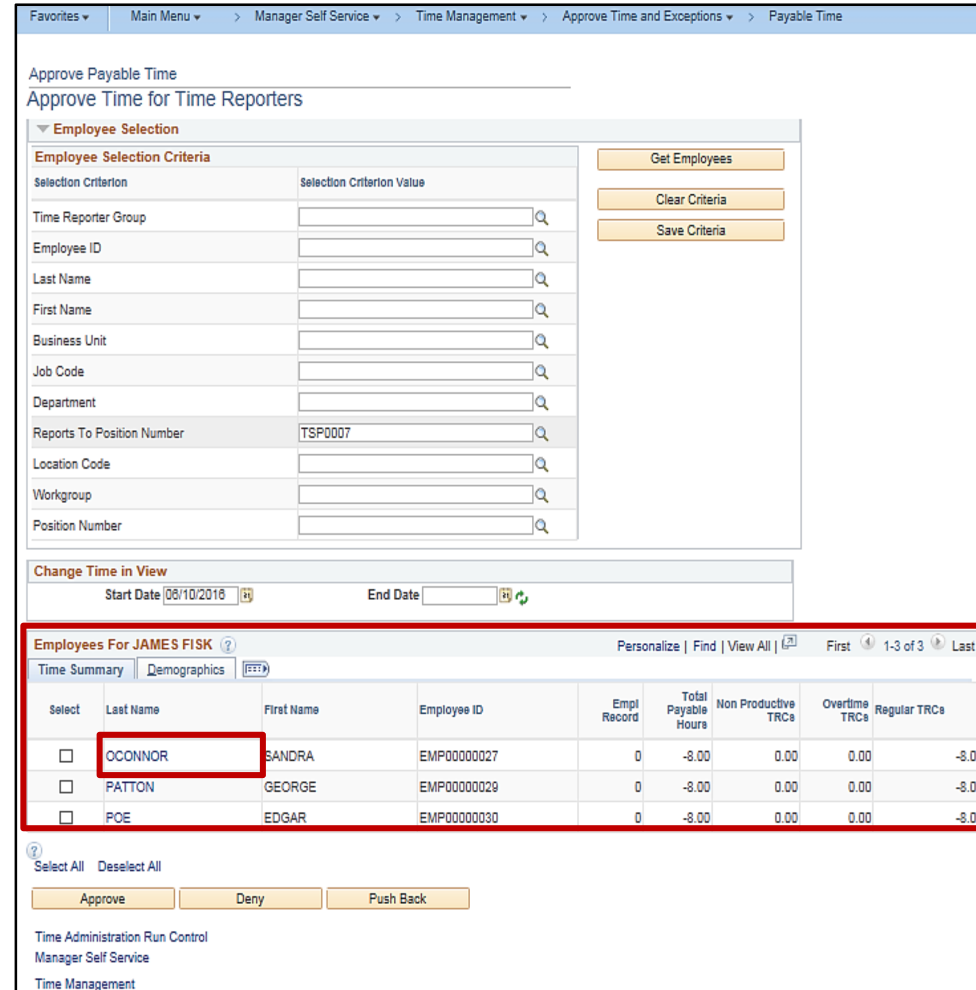
Approving Payable Time: Using Direct Navigation (continued)

Employees with timesheets requiring approval are displayed.

If no employees are returned, a message displays indicating that no employees met the search criteria. This means that you do not currently have any employees who have payable time that requires approval.

Select an employee's timesheet to approve by clicking the **Last Name**.

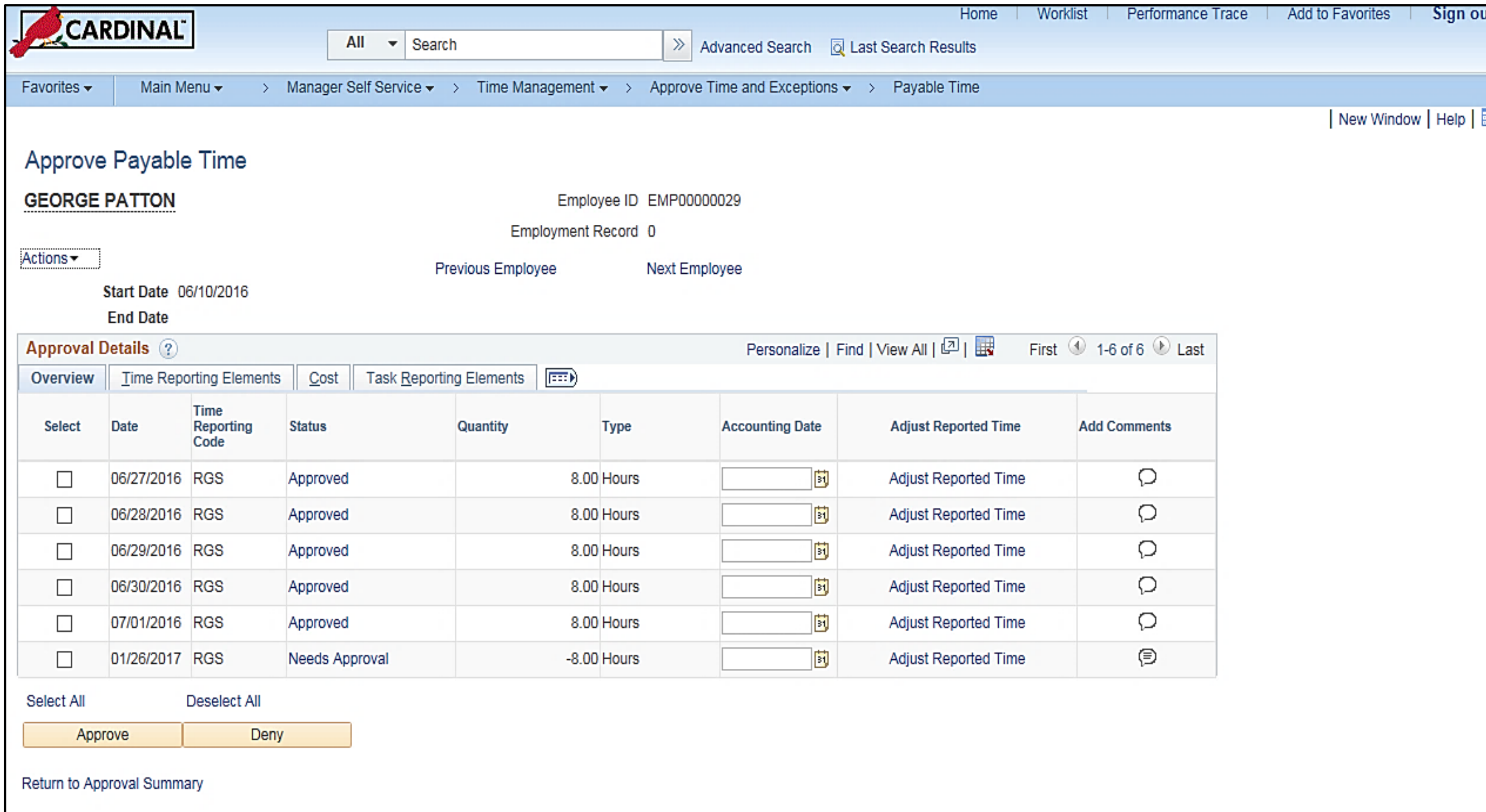
Note: Approval cannot be done from the summary page, only from the detail page.



Approving Payable Time: Using Direct Navigation (continued)

This opens the **Approve Payable Time** page.

You can approve time for the employee by individual rows or click **Select All** and then click the **Approve** button.

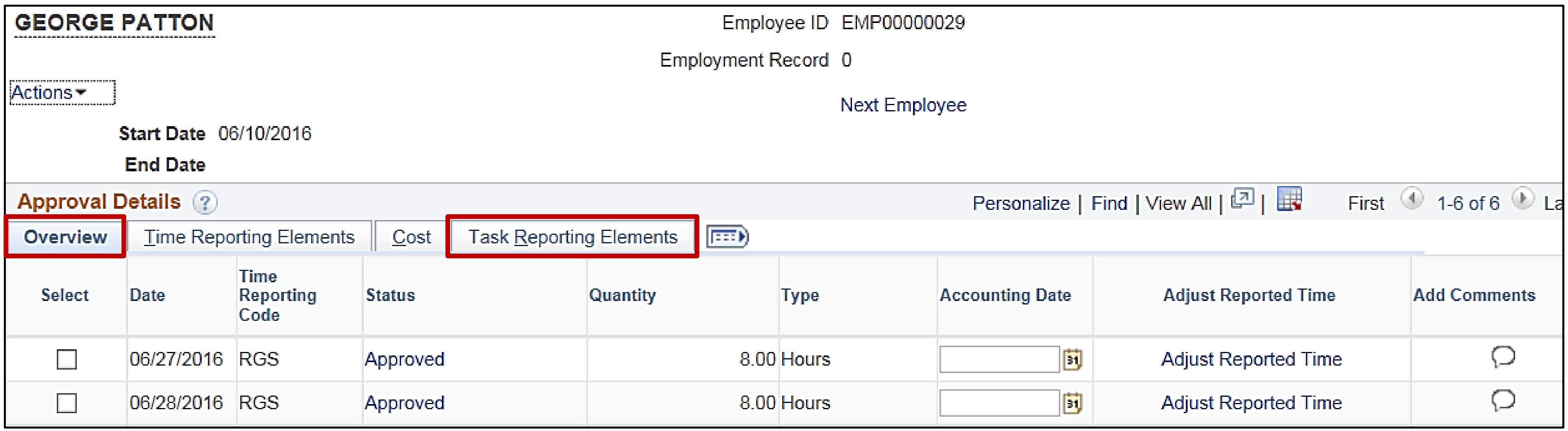


Approving Payable Time: Using Direct Navigation (continued)

The **Approve Payable Time** page allows you to view details related to the employee's time. You should review the information to ensure accuracy (i.e., hours, TRC, charge distribution, etc.).

From the **Overview** tab, you can view the **Date**, **Time Reporting Code**, and number (**Quantity**) of hours (**Type**).

To view the charge distribution, click the **Task Reporting Elements** tab.



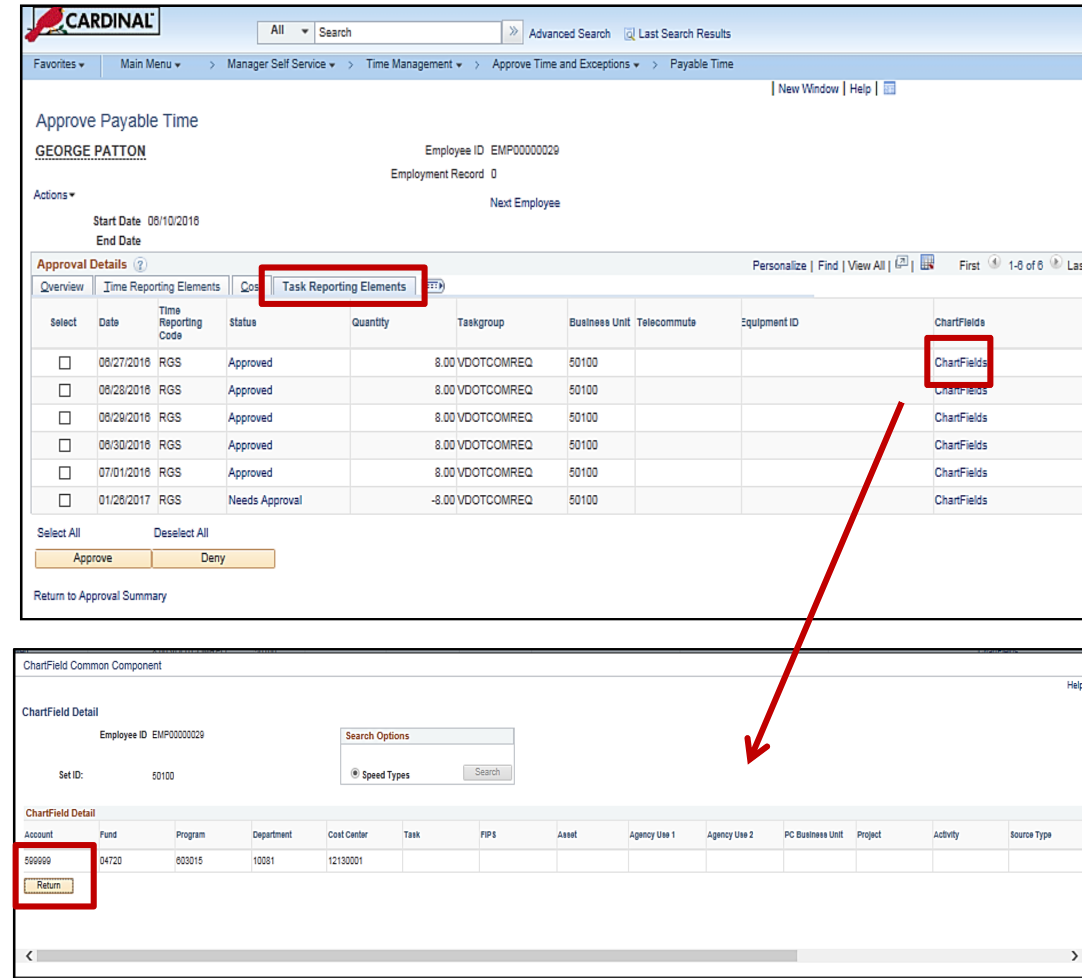
Approving Payable Time: Using Direct Navigation (continued)

On the **Task Reporting Elements** tab, click the **ChartFields** link to go to the **ChartField Detail** page and view the charge distribution for the hours entered on a selected row.

Once you review the information, click the **Return** button to go back to the **Approve Payable Time** page.

Note: You can also use the Timesheet Report to review your direct reports' hours, TRCs, and charge distribution codes.

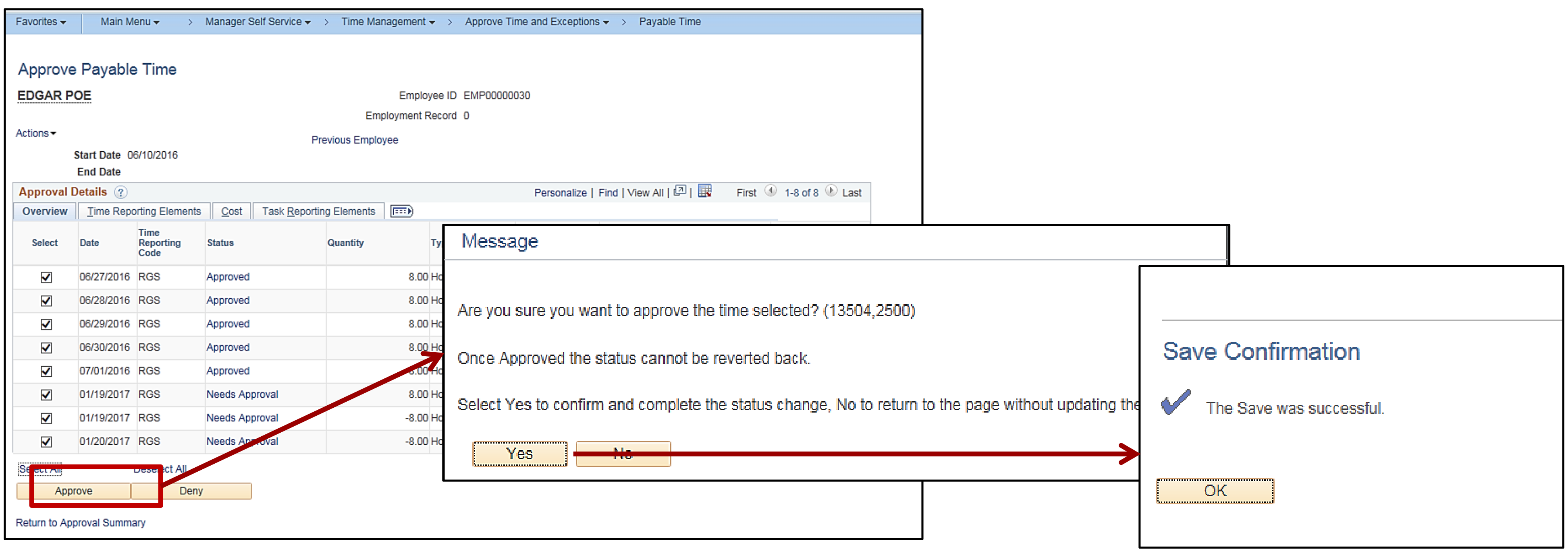
For more detailed information about viewing the Timesheet Report, see the job aid entitled **501 TA: Cardinal Reports Catalog Time & Attendance** located on the Cardinal website in **Reports Catalog** under **Resources**.



Approving Payable Time: Using Direct Navigation (continued)

After reviewing and verifying all the hours, TRCs, and charge distribution information, you are ready to approve the time:

- Click the **Select** indicator for the row you want to approve or click the **Select All** link at the bottom of the page.
- Click the **Approve** button.
- A confirmation displays asking if you are sure you want to approve the time selected. Click **Yes**.
- A message displays confirming the time has been approved. Click **OK**.



Approving Payable Time: Negative Hours

Although Cardinal does not allow an employee to enter negative hours on the **Timesheet**, you may occasionally see them on the **Approve Payable Time** page. These are system generated entries created by Cardinal.

When an employee makes an adjustment to a timesheet after it has been approved, Cardinal create a negative offset to the original approved entry. This offset generated by Cardinal displays as negative hours on the **Approve Payable Time** page.

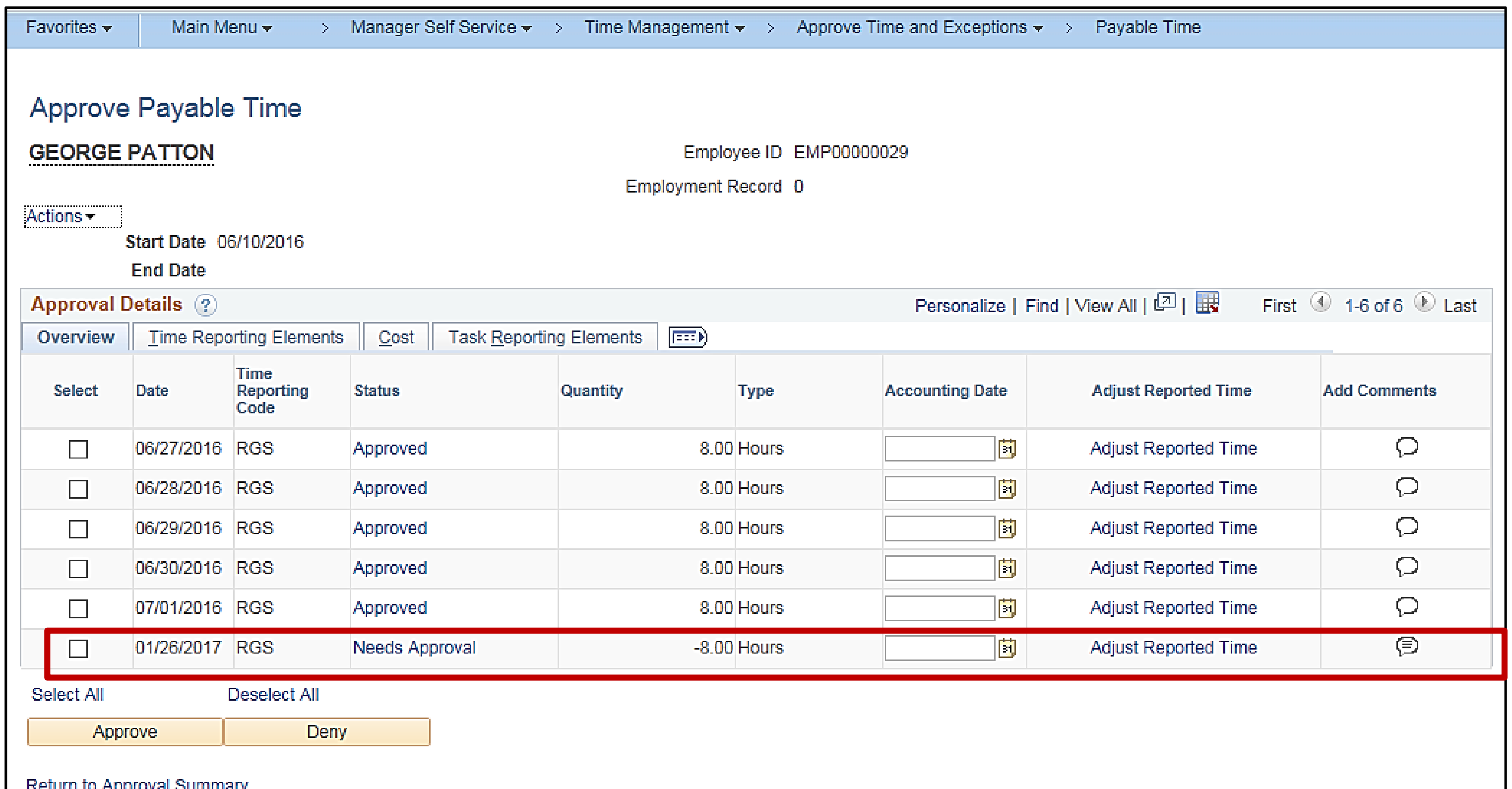
For example:

- An employee entered 8 hours of time for a particular charge distribution.
- You approve the time.
- The employee makes an adjustment to the charge distribution after the approval.
- Cardinal generates an entry of -8 hours, which displays on the **Approve Payable Time** page.

Approving Payable Time: Negative Hours (continued)

When you see negative hours on the **Approve Payable Time** page, **it is very important that you approve them**. These are entries generated by Cardinal that allow reconciliation of the hours when the allocation process is run. Failure to approve the hours will cause errors with allocation.

Always approve negative hours included on the **Approve Payable Time** page.



Denying Payable Time: Worklist

- To deny the employee's payable time, click the **Deny** button.
- If you deny payable time, the employee receives a Cardinal e-mail notification.
- The employee's timesheet must then be corrected and resubmitted.
- Once resubmitted, the timesheet is reprocessed through the Time Administration process to verify that it has no **High** exceptions.
- It then becomes payable time and routes back to you for approval.

Simulation: Approve Payable Time

You will now view a simulation that demonstrates how to approve payable time in Cardinal.

Click on the icon below to start the simulation.

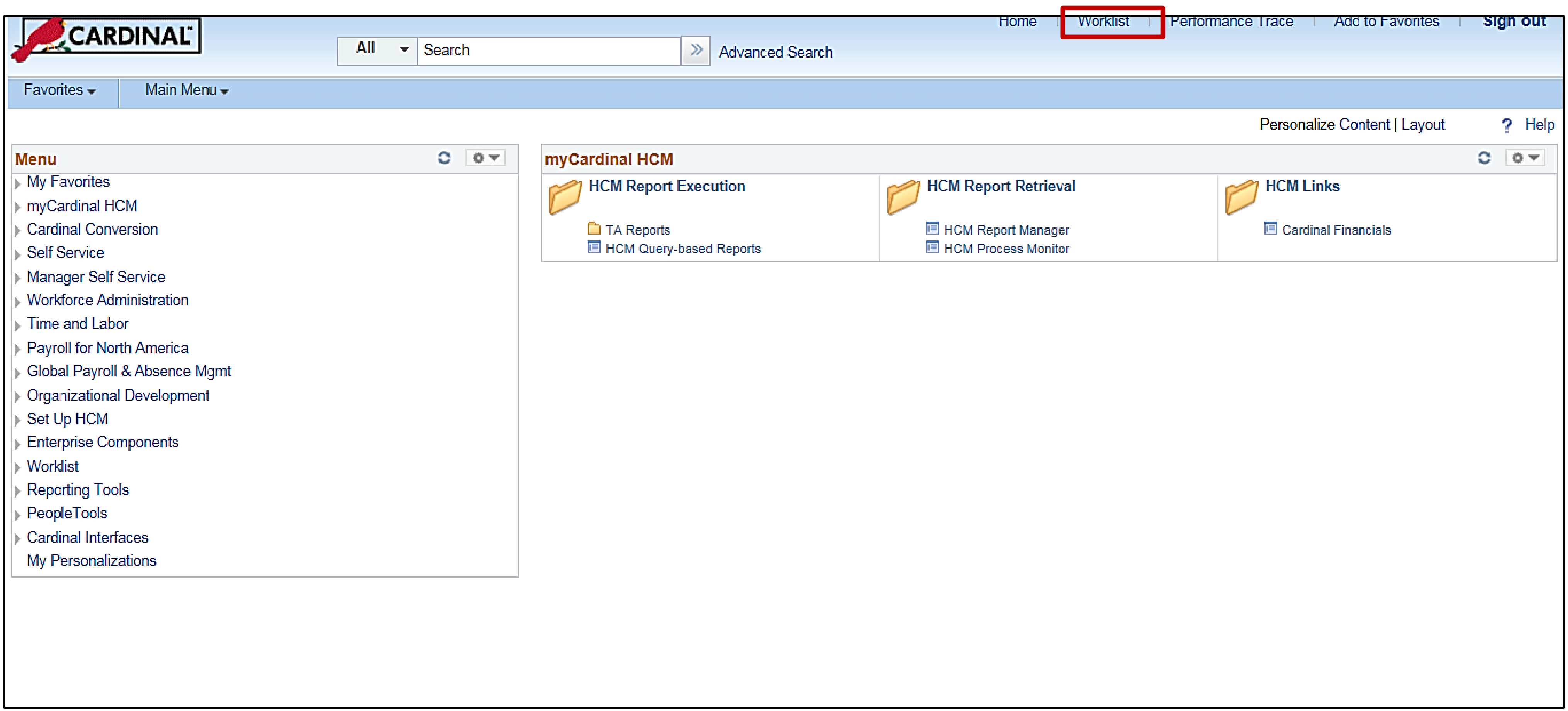
Reported Time (Absences) Approval Options

You have the two options for approving reported time (i.e., absences):

- **Worklist** link
- Direct navigation to the **Approve Reported Time** page

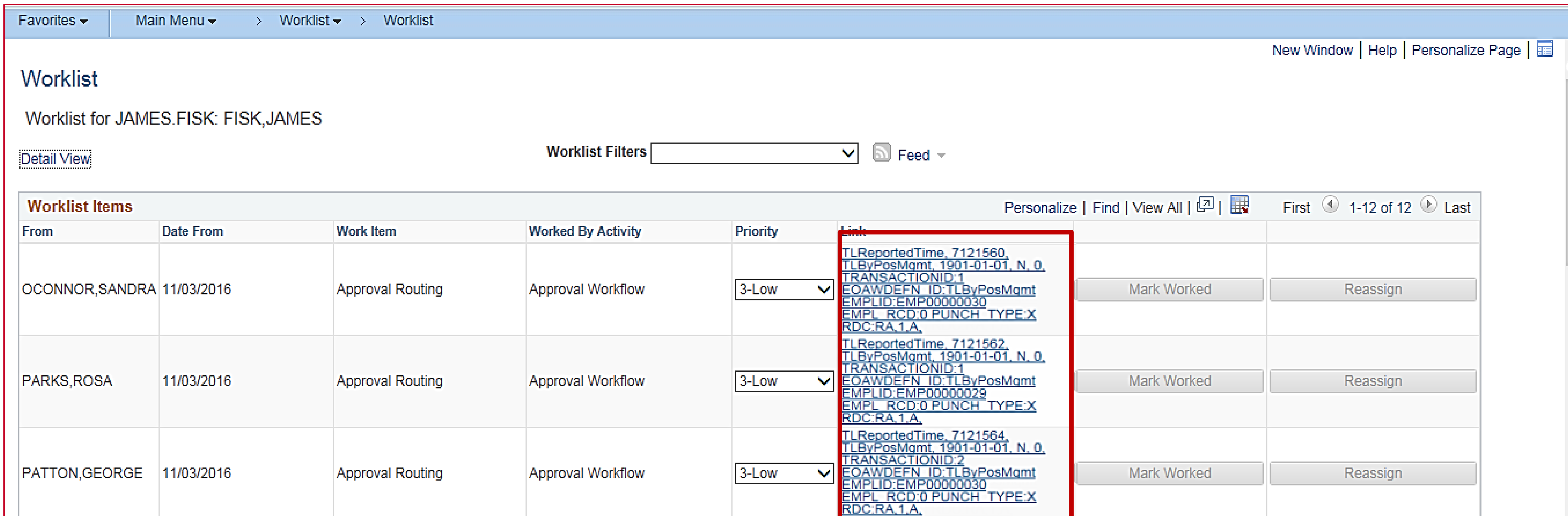
Approving Reported Time: Using the Worklist

To approve reported time (absences) using the worklist, click the **Worklist** link located at the top of the **Cardinal HCM Home** page.



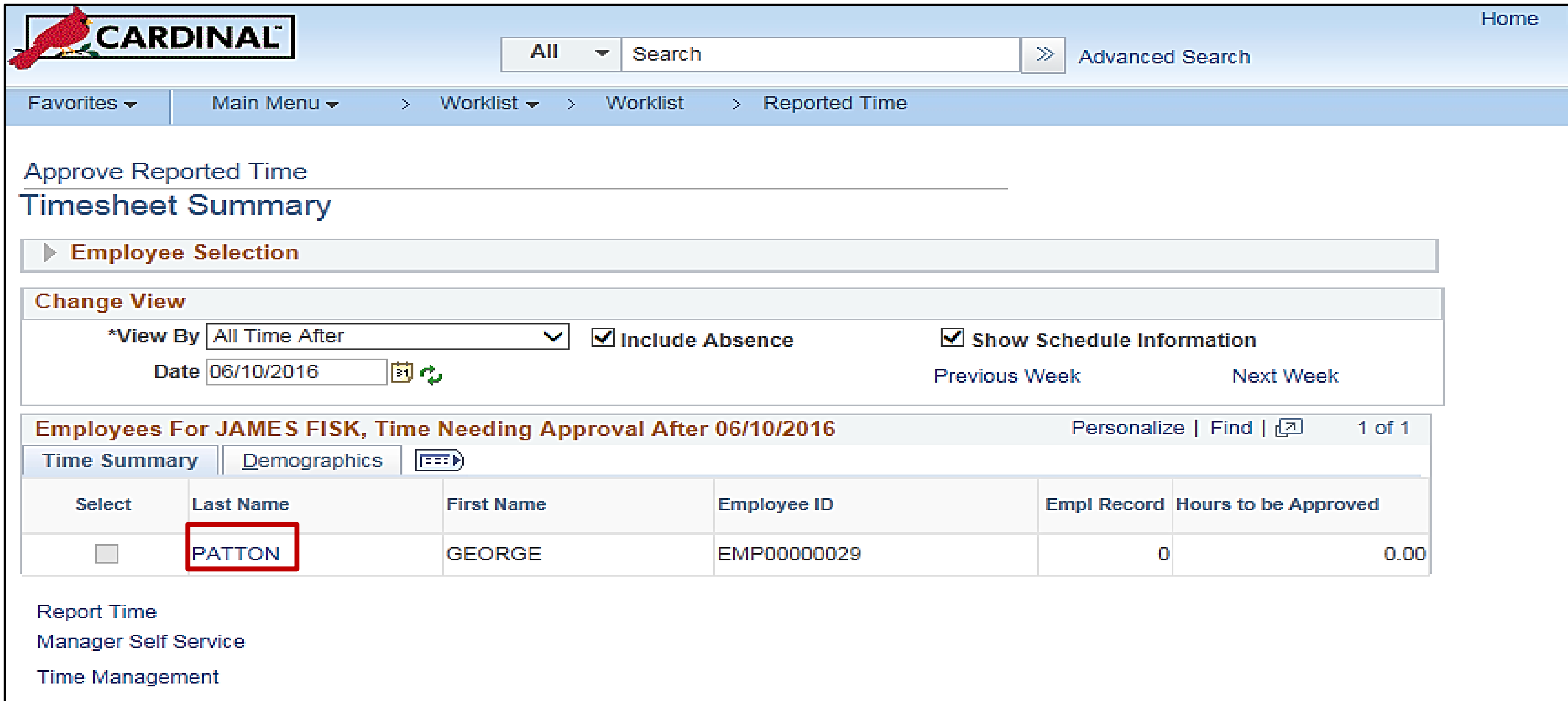
Approving Reported Time: Using the Worklist (continued)

The **Worklist** page displays and shows all items that require your approval. To access reported time (absences) that require approval, use the **Links** column to identify any items that start with **TL_Reported Time**. Click the link.



Approving Reported Time: Using the Worklist (continued)

The **Approved Report Time** page displays and you must click the **Last Name** link.

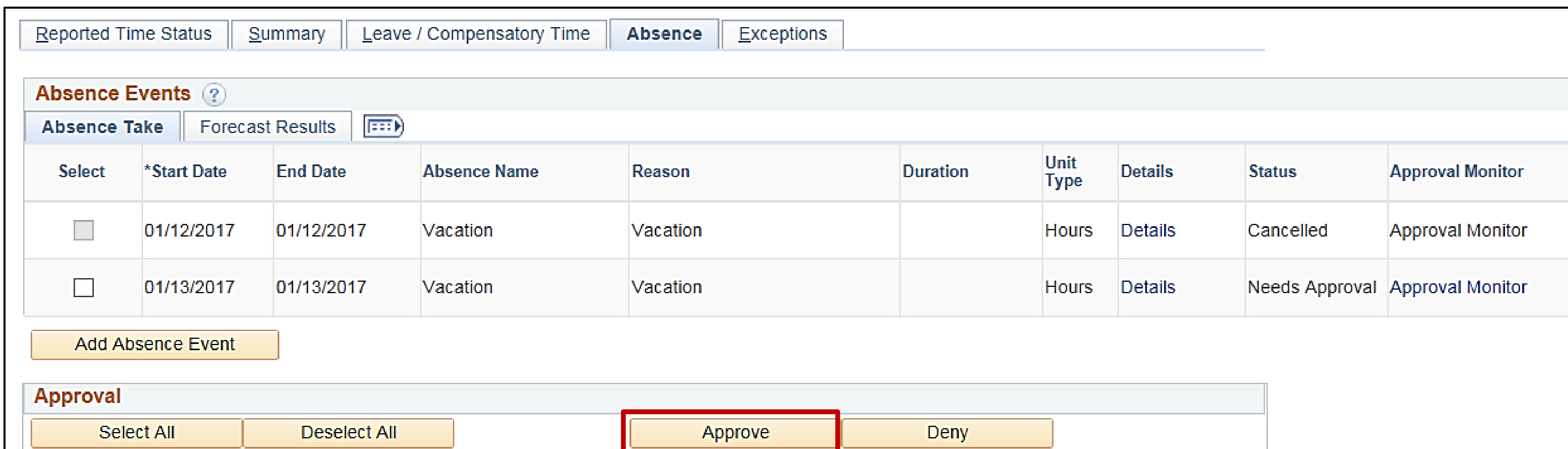


Approving Reported Time: Using the Worklist (continued)

The **Timesheet** Summary page opens for the selected employee.

To approve an absence request, click the **Select** checkbox in front of the absence you want to approve. To approve multiple absences on the same timesheet, click the **Select All** link.

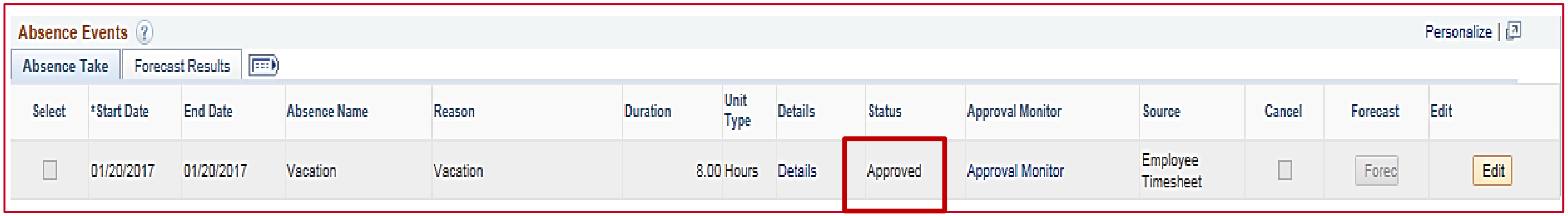
Scroll down to the bottom of the page and click the **Approve** button. A confirmation page displays asking you to confirm you want to approve. Click **Yes** to confirm the approval.



Approving Reported Time: Using the Worklist (continued)

Once the absence is approved, the **Status** changes from **Needs Approval** to **Approved**.

At this point you can click the **Worklist** link at the top of the page and repeat this process for other reported time (absence) requests that require approval.



Absence Events

Personalize |

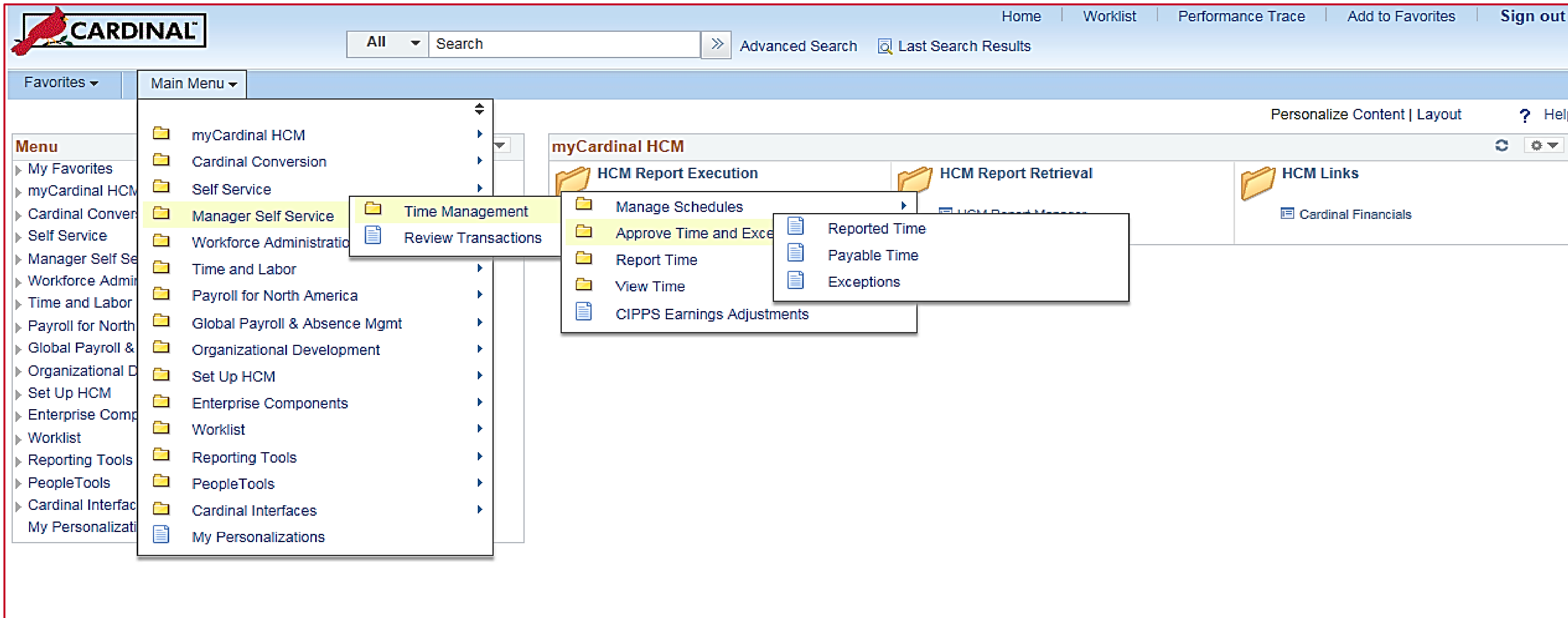
Absence Take | Forecast Results

Select	*Start Date	End Date	Absence Name	Reason	Duration	Unit Type	Details	Status	Approval Monitor	Source	Cancel	Forecast	Edit
	01/20/2017	01/20/2017	Vacation	Vacation	8.00	Hours	Details	Approved	Approval Monitor	Employee Timesheet		Forec	Edit

Approving Reported Time: Using Direct Navigation

To approve reported time (absences) via direct navigation, access the **Approve Reported Time** search page using the following path:

Main Menu > Manager Self Service > Time Management > Approve Time and Exceptions > Reported Time



Approving Reported Time: Using Direct Navigation (continued)

The **Approve Reported Time** search criteria page displays.

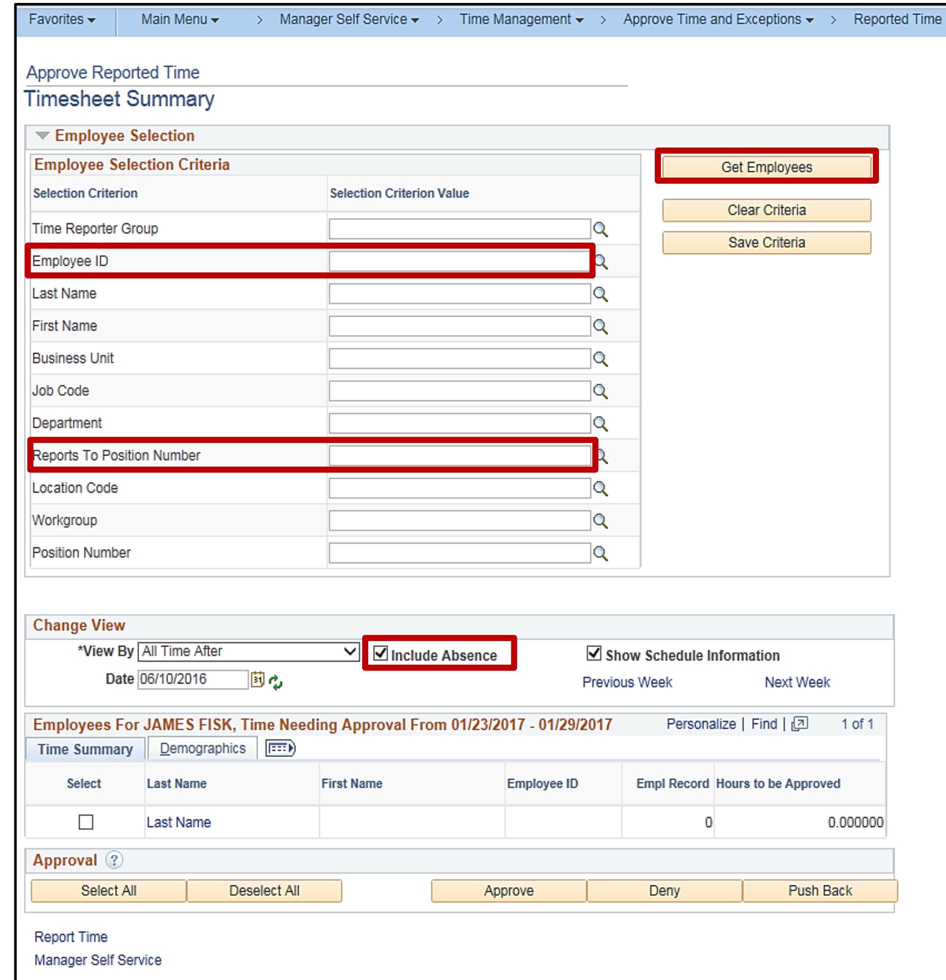
To approve reported time (absences):

- Enter your position number in **Reports to Position Number** field to select all Time Reporters who report to your Position number that have absences that require approval.

- The **Include Absence** checkbox defaults to selected. Do not change it.

- Click the **Get Employees** button. If no employees are returned, a message displays indicating that no employees met the search criteria, this means that you do not currently have any employees who have reported (absence) time that needs approval.

•You can check on a specific employee's payable time, by entering the employee's **Employee ID** as your search criteria.



Approving Reported Time: Using Direct Navigation (continued)

To approve Reported Time, repeat the steps you used to approve from the worklist:

- Select the employee you want to approve reported time for by clicking on the name.
- Click the name of the employee you wish to access for approval. The **Timeshee**t page displays for the selected employee.
- Click the **Absence Event – select** to view link.
- Review the request(s). Click the checkbox under the **Select** column or use the **Select All** indicator for multiple requests that require approval.
- Scroll to the bottom of the page.
- Click the **Approve** button.
- Click the **Yes** button when the confirmation message displays.
- Confirm the Status updates to **Approved**.

If you have additional employees that require approval, click the **Return to Select Employees** link at the bottom of the **Timesheet** page and select the next employee’s **Name** from the bottom of the page.

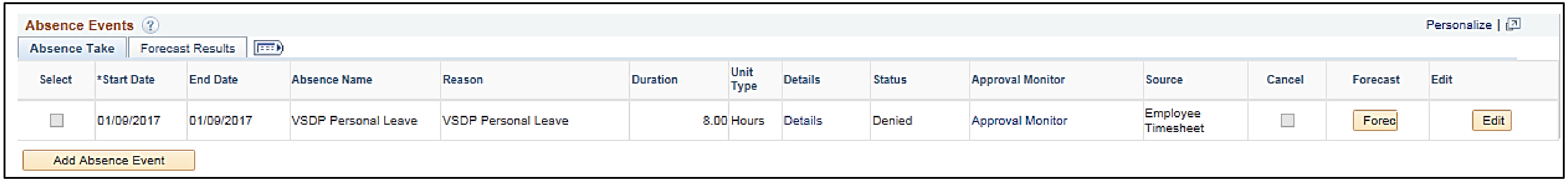
Denying Reported Time

If you wish to deny the absence request(s), select the absence(s) you want to deny. Click the **Deny** button and a confirmation page displays asking you to confirm you want to deny the request(s). Click **Yes** to confirm the denial.

Time that has been denied is still visible on the timesheet and the **Status** field indicates **Denied**. Absences that have been denied do not impact the leave balances.

When a request is denied, the person who entered the request receives an e-mail notification with information regarding the action that was taken by the approver. A denied absence request can still be edited and resubmitted.

Click the **Worklist** link at the top of the page to view other absence requests that require approval.



Extended Leave Approvals

Extended leave absences, including Family and Medical Leave (FMLA), Short Term Disability (STD), Long Term Disability (LTD), and Worker's Compensation, typically require entry and additional approvals by Human Resources.

FMLA entitlement balances must be created for the employee before it can be entered or approved. The other extended leave absence types (STD, LTD, and Worker's Compensation) are entered into Cardinal by the Absence Management Administrator, not the employee or supervisor.

For more detailed information about creating, entering, approving, and managing these absences, see the course entitled **501 TA366: Absence Management Maintenance** located on the Cardinal website in **Course Materials** under **Training**.

Approving FMLA

Some FMLA absences may be entered by the employee or approver/timekeeper; employees must coordinate with Human Resources staff, who can enable those users to select FMLA as an absence type. FMLA absences entered by the employee route to the supervisor for approval.

<u>The FMLA hours must be entered in conjunction with another absence type</u>. If 8 hours FMLA is entered, then another absence type must also be entered for 8 hours. This means there are two lines that require approval. Be sure to confirm the employee is using another leave type along with FMLA and approve both.

Reported Time Status | Summary | Leave / Compensatory Time | Absence | Exceptions

Absence Events ? Personalize |

Absence Take | Forecast Results

Select	*Start Date	End Date	Absence Name	Reason	Duration	Unit Type	Details	Status	Approval Monitor	Source	Cancel	Forecast	Edit
	01/23/2017	01/27/2017	VSDP Sick Leave	VSDP Sick Leave	40.00	Hours	Details	Needs Approval	Approval Monitor	Employee Timesheet		Forec	Edit
	01/23/2017	01/31/2017	Family and Medical Leave		40.00	Hours	Details	Needs Approval	Approval Monitor	Administrator Absence Event		Forec	Edit

Add Absence Event

Simulation: Approving Reported Time - Absences

You will now view a simulation that demonstrates how to approved Reported Time (absences).

Click on the icon below to start the simulation.

Lesson 3: Summary

3 Approving and Denying Payable and Reported time

In this lesson, you learned:

- Approve reported time and payable time using the **Worklist** link and direct navigation
- Approve negative hours on the **Payable Time** page
- Approve FMLA as reported time

Lesson 4: Introduction

4 Delegating Time and Attendance Items

This lesson covers the following topics:

- Delegation Overview
- Managing Delegation
- Reviewing Proxies
- My Delegating Authority

Delegation Overview

Time and absence items remain on your worklist until you approve them   There is no escalation process. This means that if you do not approve your direct reports' time, it does not roll up to someone else.

The delegation process allows you to move your worklist to another approver so your direct reports' time is approved in your absence.

If you are out and your time is not delegated to someone else for approval, it creates additional work for Payroll and others. It is important and necessary to delegate your worklist when you plan to be out.

Managing Delegation

You can delegate Time and Attendance approvals to another approver for a defined period of time in Cardinal.

You can choose to delegate all of your approvals, or just particular types of approvals (e.g., payable time or reported time) to a proxy. When you delegate approval authority to a proxy, the proxy acts on your behalf to approve pending transactions. They are notified of pending transactions and can execute approvals.

When you delegate your approvals, all current pending items on your worklist move to the proxy's worklist. If you revoke your delegation, pending items move from the proxy's worklist back to your worklist.

You cannot delegate the same transaction to more than one proxy for the same delegation period.

Use the **Manage Delegation** page to delegate approvals.

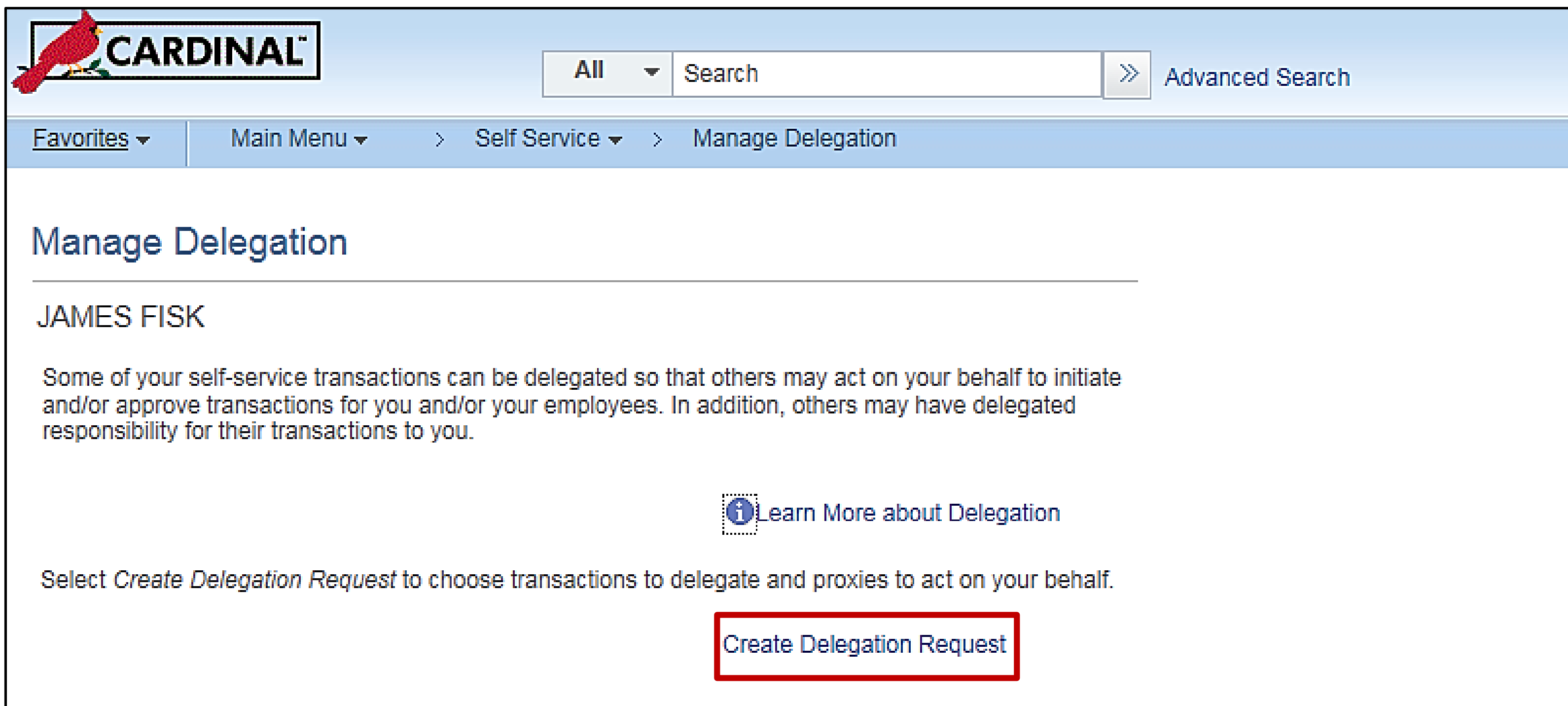
Note: The proxy must accept the delegation before it is effective.

Managing Delegation (Continued)

To delegate one or several Time and Attendance items, go to the **Manage Delegation** page. You can navigate to this page in the **Cardinal Time and Attendance (HCM)** site using the following path:

Main Menu > Self Service > Manage Delegation

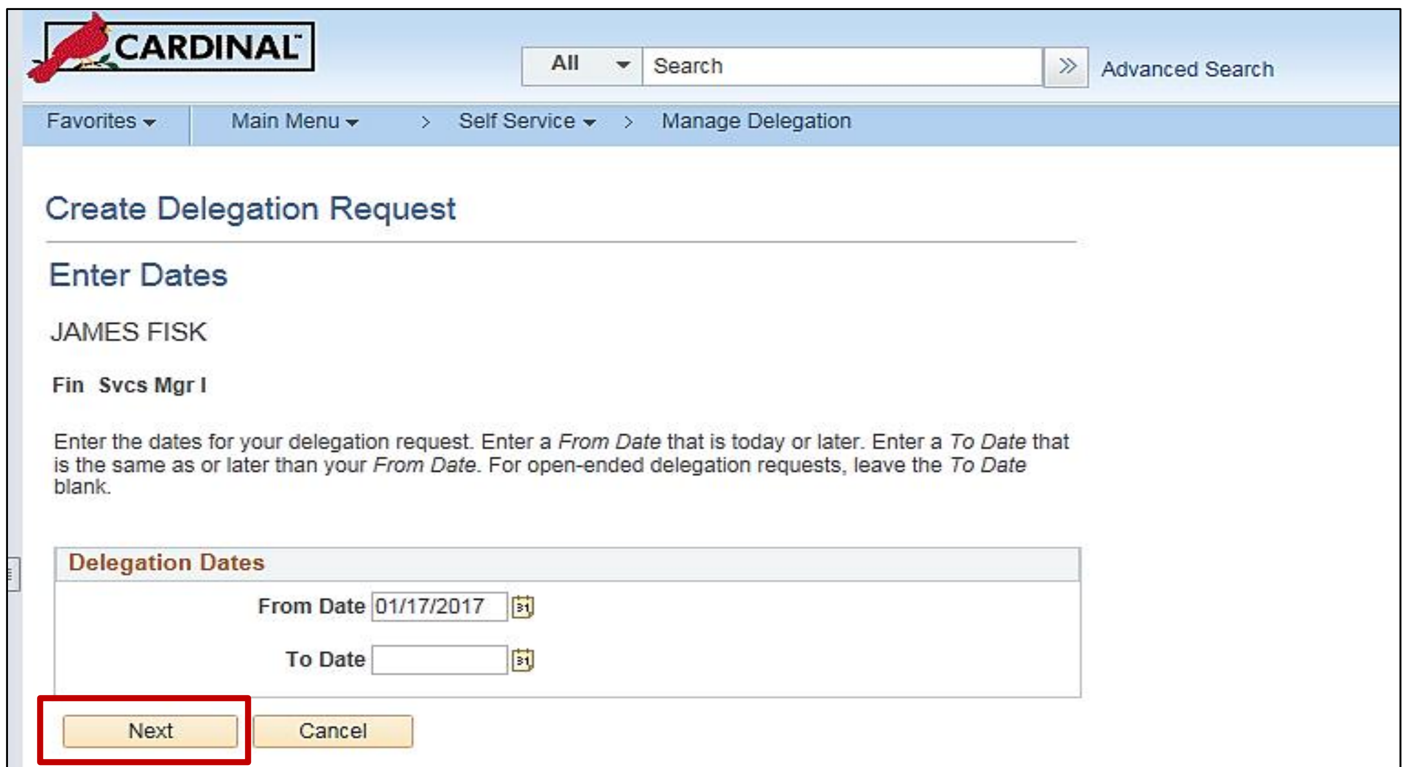
To delegate Time and Attendance items, click the **Create Delegation Request** link.



Managing Delegation (continued)

When you create a delegation request, you must specify a **From Date** and **To Date**. A populated **From Date** indicates that the delegation is effective from that date until the **To Date.**

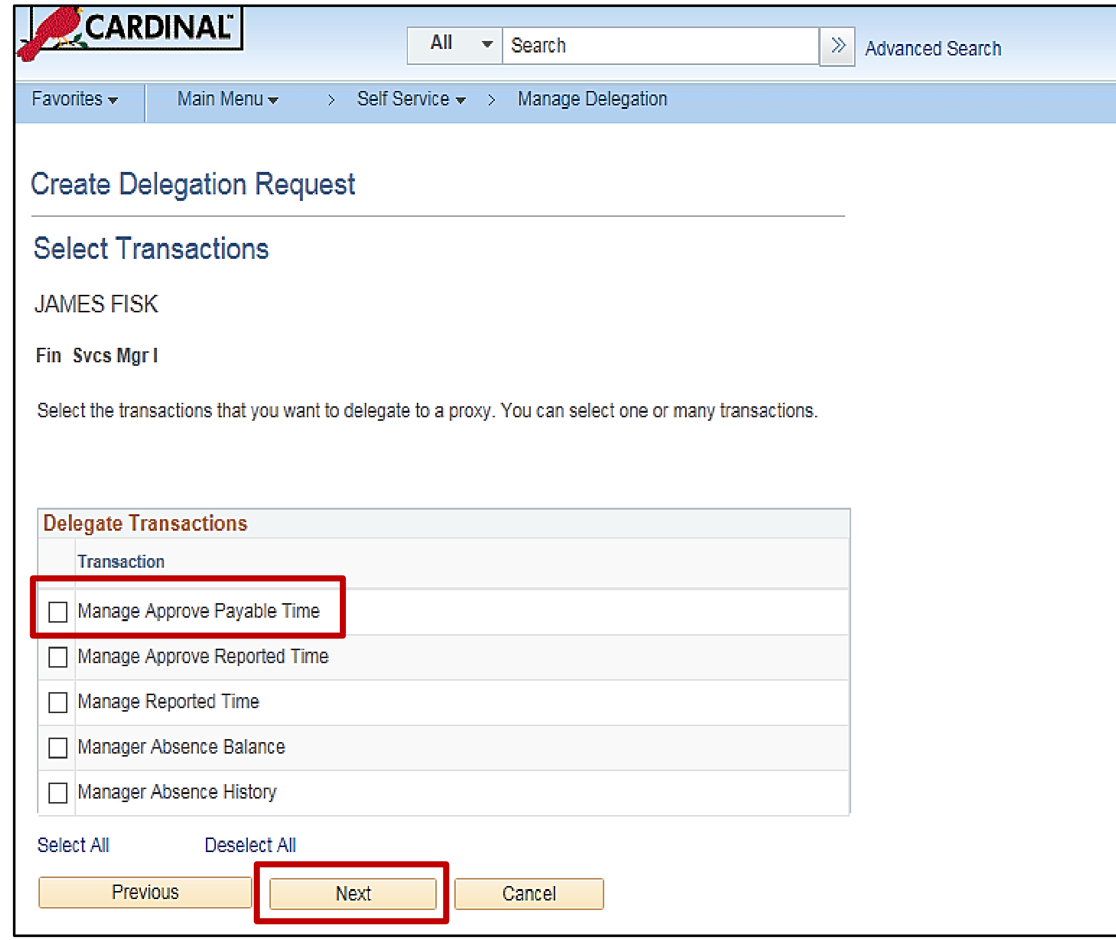
Then enter the time period that your approvals should be sent to the other approver in the **From Date** and **To Date** fields, then click **Next**.



Managing Delegation Steps (continued)

Click the checkbox for each type of approval you wish to reassign. There are five options to select from:

- **Manage Approve Payable Time:** Delegates payable time approvals
- **Manage Approve Reported Time:** Delegates reported time (i.e., absences) approvals
- **Manage Reported Time:** Delegates initiation/entry of reported time (i.e., absences)
- **Manager Absence Balance:** Delegates the viewing of absence balances
- **Manager Absence History:** Delegates the viewing of absence history

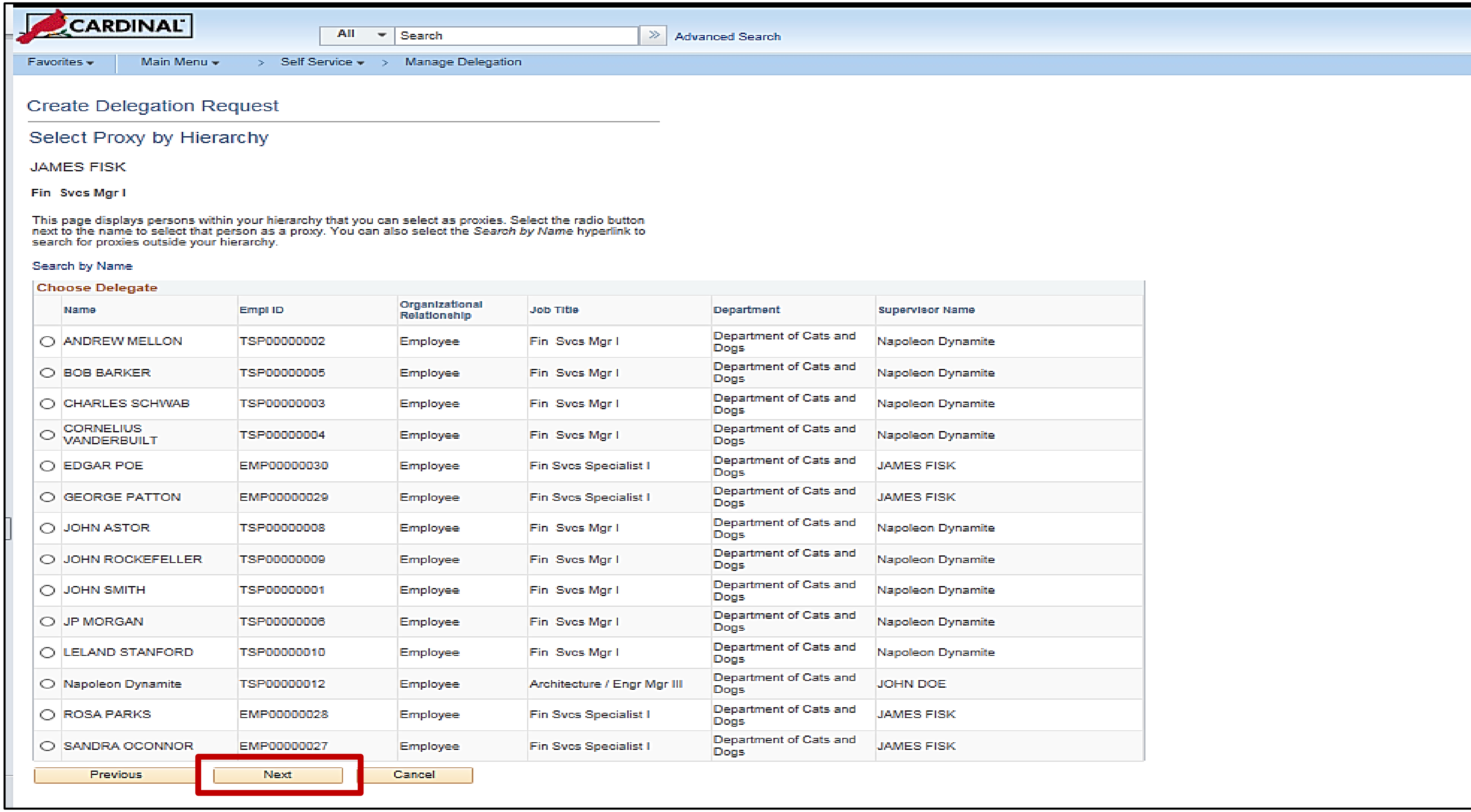


Select the checkbox for **Manage Approve Reported Time** to delegate absence approvals.

Click the **Next** button.

Managing Delegation Steps (continued)

Click the radio button to the left of the proxy to whom you wish to delegate and click **Next.**



CARDINAL

All | Search | Advanced Search

Favorites | Main Menu | > Self Service | > Manage Delegation

Create Delegation Request

Select Proxy by Hierarchy

JAMES FISK

Fin Svcs Mgr I

This page displays persons within your hierarchy that you can select as proxies. Select the radio button next to the name to select that person as a proxy. You can also select the *Search by Name* hyperlink to search for proxies outside your hierarchy.

Search by Name

Choose Delegate

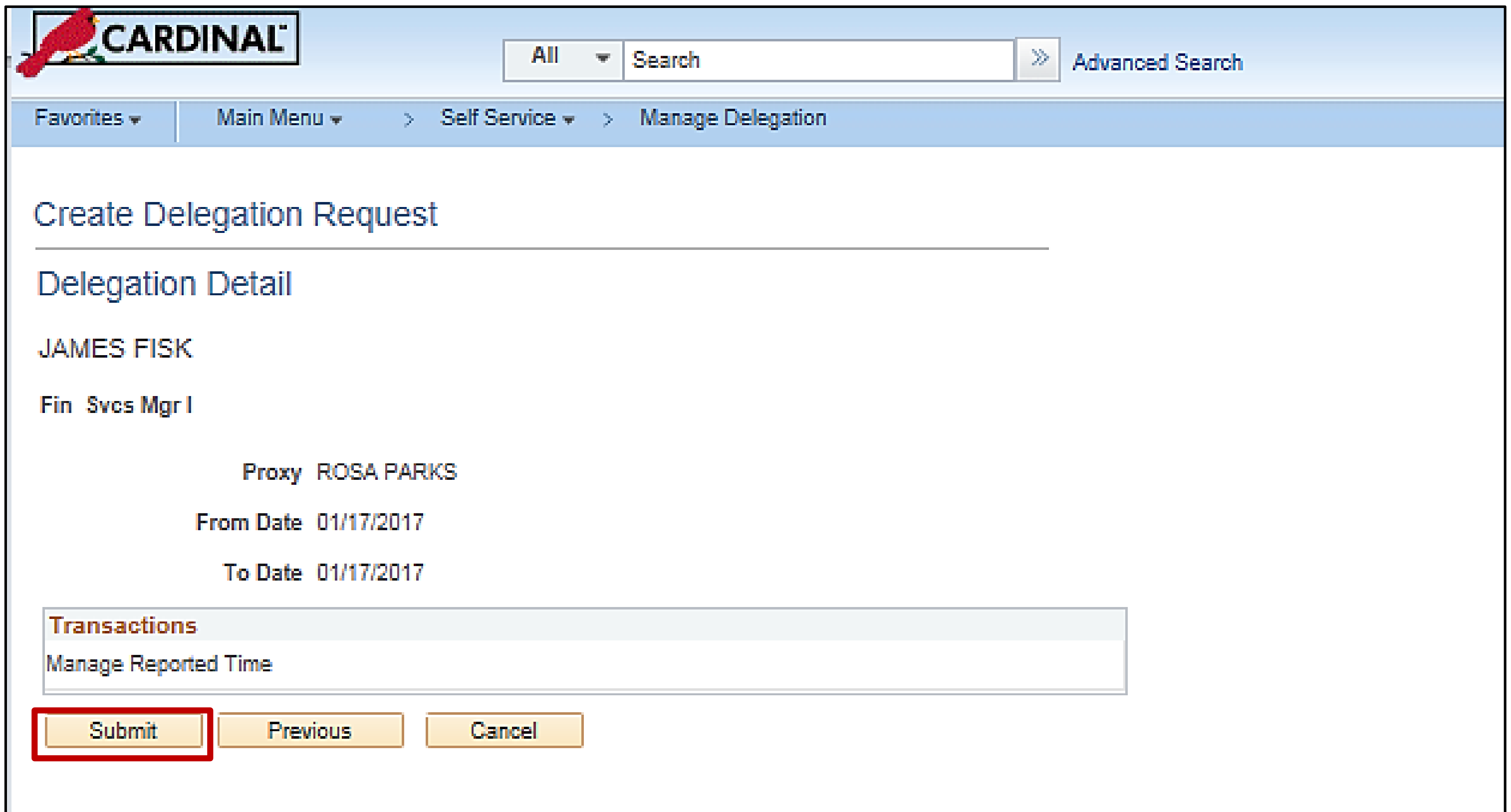
Name	Empl ID	Organizational Relationship	Job Title	Department	Supervisor Name
ANDREW MELLON	TSP00000002	Employee	Fin Svcs Mgr I	Department of Cats and Dogs	Napoleon Dynamite
BOB BARKER	TSP00000005	Employee	Fin Svcs Mgr I	Department of Cats and Dogs	Napoleon Dynamite
CHARLES SCHWAB	TSP00000003	Employee	Fin Svcs Mgr I	Department of Cats and Dogs	Napoleon Dynamite
CORNELIUS VANDERBUILT	TSP00000004	Employee	Fin Svcs Mgr I	Department of Cats and Dogs	Napoleon Dynamite
EDGAR POE	EMP00000030	Employee	Fin Svcs Specialist I	Department of Cats and Dogs	JAMES FISK
GEORGE PATTON	EMP00000029	Employee	Fin Svcs Specialist I	Department of Cats and Dogs	JAMES FISK
JOHN ASTOR	TSP00000008	Employee	Fin Svcs Mgr I	Department of Cats and Dogs	Napoleon Dynamite
JOHN ROCKEFELLER	TSP00000009	Employee	Fin Svcs Mgr I	Department of Cats and Dogs	Napoleon Dynamite
JOHN SMITH	TSP00000001	Employee	Fin Svcs Mgr I	Department of Cats and Dogs	Napoleon Dynamite
JP MORGAN	TSP00000006	Employee	Fin Svcs Mgr I	Department of Cats and Dogs	Napoleon Dynamite
LELAND STANFORD	TSP00000010	Employee	Fin Svcs Mgr I	Department of Cats and Dogs	Napoleon Dynamite
Napoleon Dynamite	TSP00000012	Employee	Architecture / Engr Mgr III	Department of Cats and Dogs	JOHN DOE
ROSA PARKS	EMP00000028	Employee	Fin Svcs Specialist I	Department of Cats and Dogs	JAMES FISK
SANDRA OCONNOR	EMP00000027	Employee	Fin Svcs Specialist I	Department of Cats and Dogs	JAMES FISK

Previous | Next | Cancel

Managing Delegation (continued)

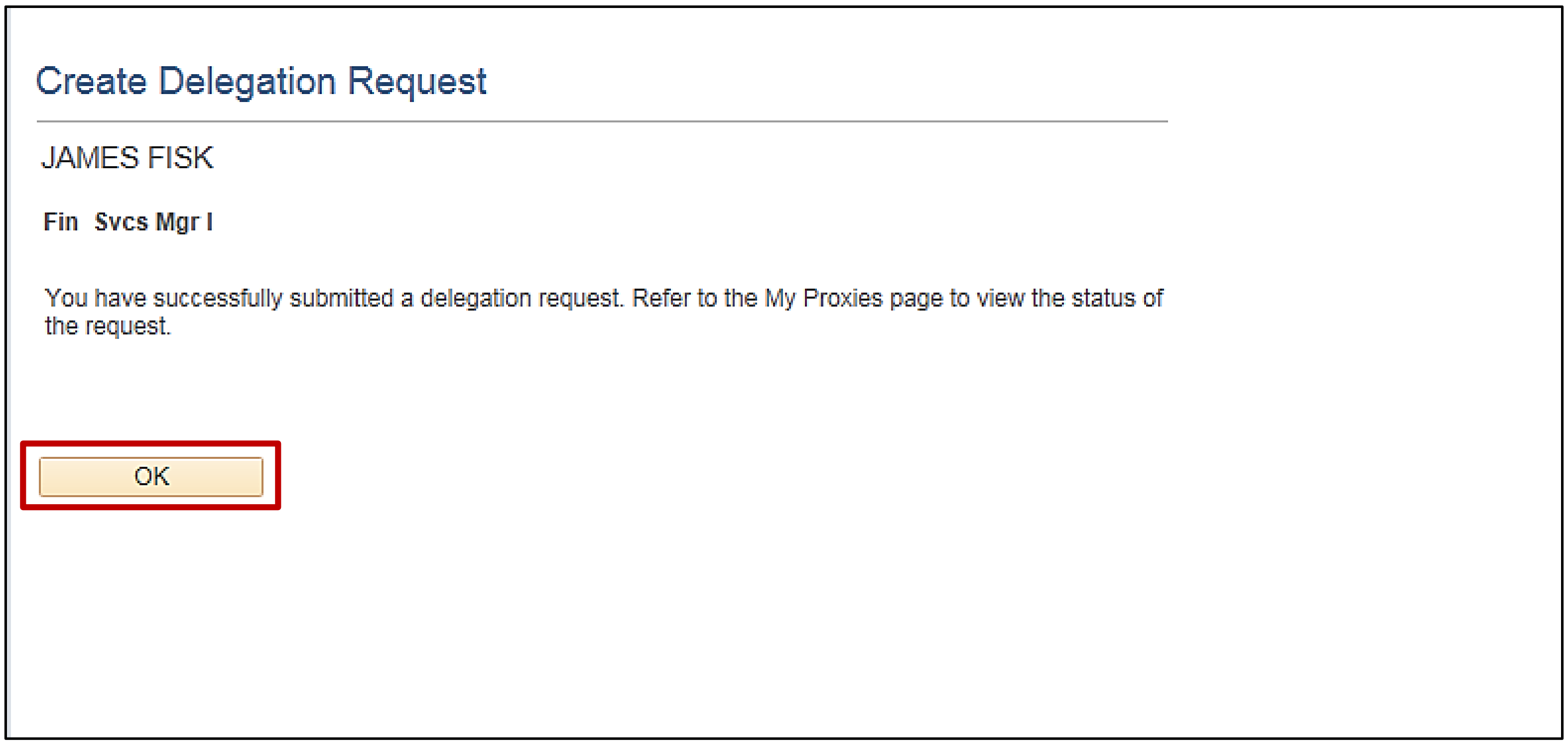
Click the **Notify Delegator** checkbox to notify the delegator, then click **Submit**.

The proxy (person you are delegating items to) will receive an e-mail notification and worklist item that you have delegated items to them.



Managing Delegation Steps (continued)

Click **OK** to complete the delegation request.



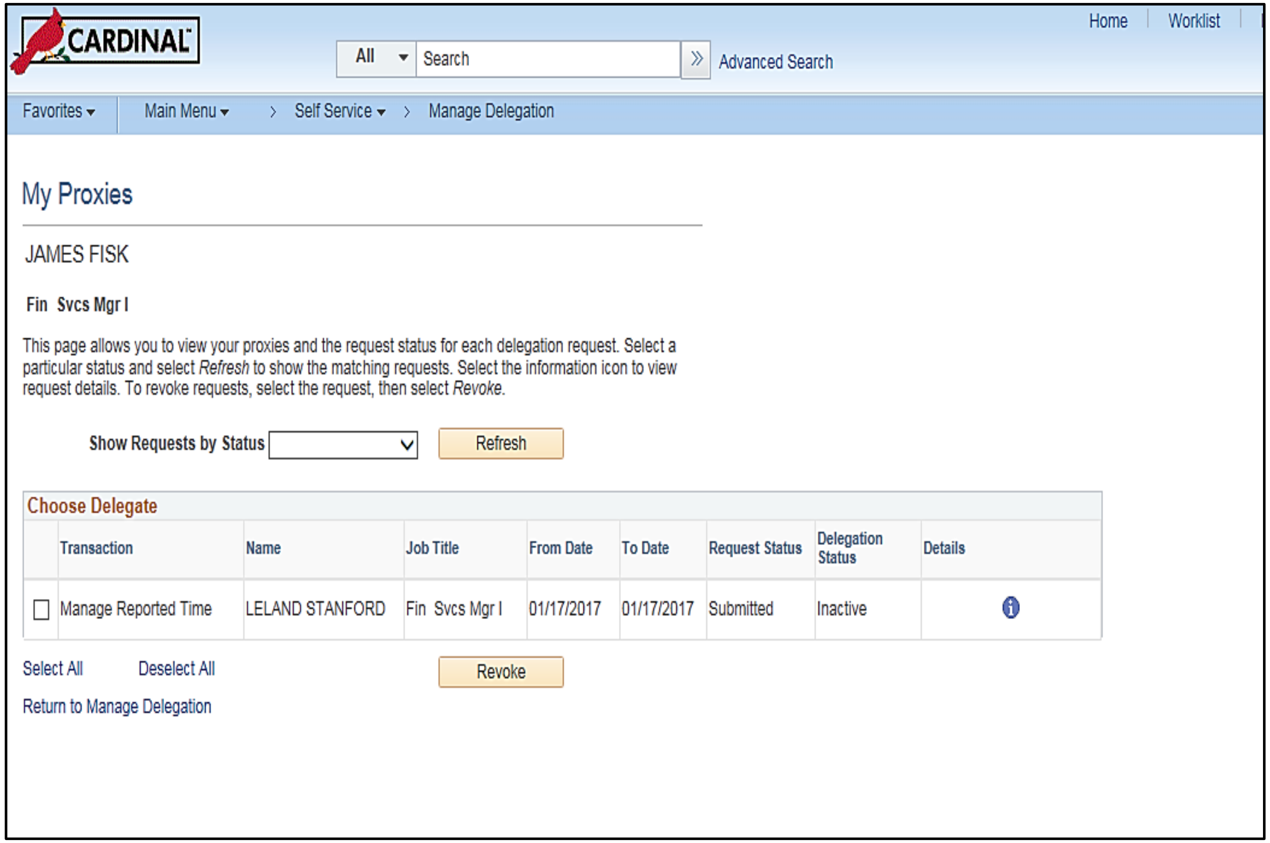
Reviewing Proxies

To view a list of transaction types that you have delegated to proxies or to revoke the delegated authority of proxies, go to the **Manage Delegation** page and click the **Review My Proxies** link.

You can use different views and filter existing proxies by their status, using the **Show Requests by Status** drop-down menu.

Click the information icon to view the details of the delegation. This takes you to the **Delegation Request Details** page. Return to the **Review My Proxies** page by clicking the **Return to My Proxies** link.

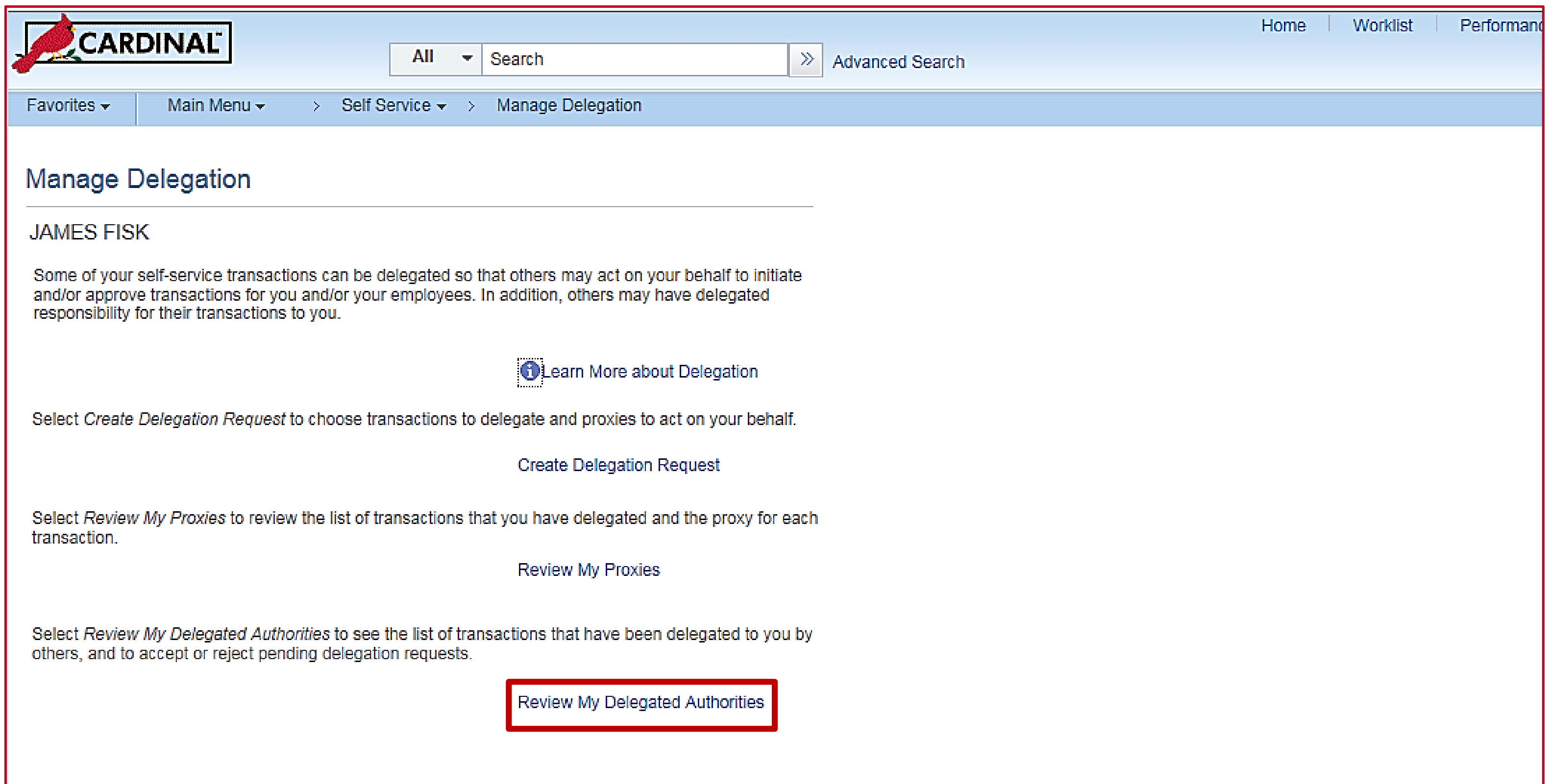
To revoke a proxy, select the relevant proxy checkbox and click the **Revoke** button.



My Delegated Authorities

Remember, proxies must accept a delegation request before it is effective.

This is done on the **My Delegated Authorities** page, accessed from the **Manage Delegation** page. Note that you will only be able to see the **My Delegated Authorities** link if you have received a delegation request. Click the **Review My Delegated Authorities** link to accept or reject a delegation.

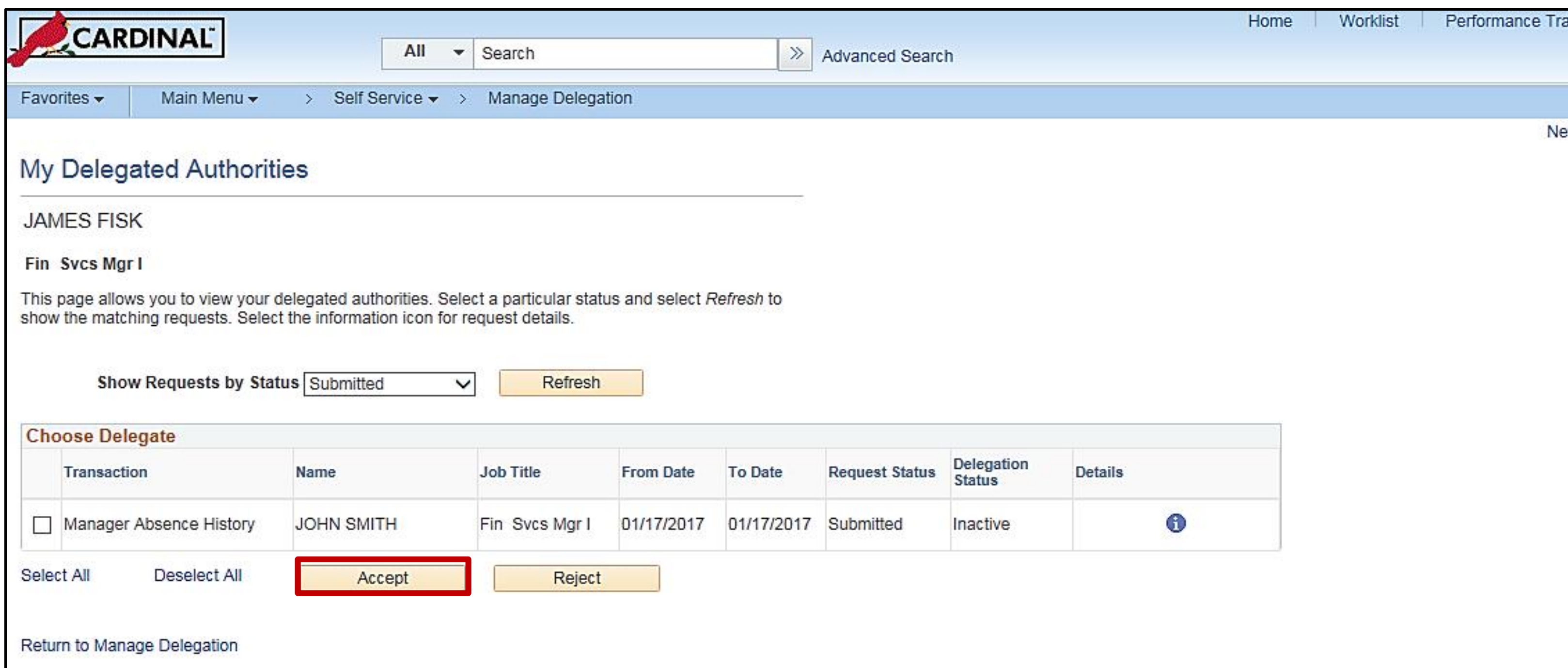


My Delegated Authorities (continued)

To accept or reject the delegation:

- Select the checkbox on the delegation request line.
- Click the **Accept** or **Reject** button as relevant and confirm by clicking **OK** on the confirmation page.

•For more detailed information about delegated worklist, see the job aid entitled **501 TA365: Delegating and Revoking Your Worklist** located on the Cardinal website in **Job Aids** under **Training**.



Course Summary

TA365 Time and Attendance Approvals

In this lesson, you learned:

- Describe Time and Attendance concepts and approval overview
- Explain the difference between payable time and reported time
- Approve or deny payable time and reported time via the worklist or direct navigation
- Approve extended leave
- Manage timesheet exceptions
- Delegate approval items on your worklist

Course Evaluation

Congratulations! You successfully completed the **501 TA365: Time and Attendance Approvals** course.

Click here to access the evaluation survey for this course.

Once you have completed and submitted the survey, close the survey window. To close the web based training course, click the [**X**] button in the upper right corner.

Appendix

- Key Terms
- Diagrams and Screenshots
- Flowchart Key

Key Terms

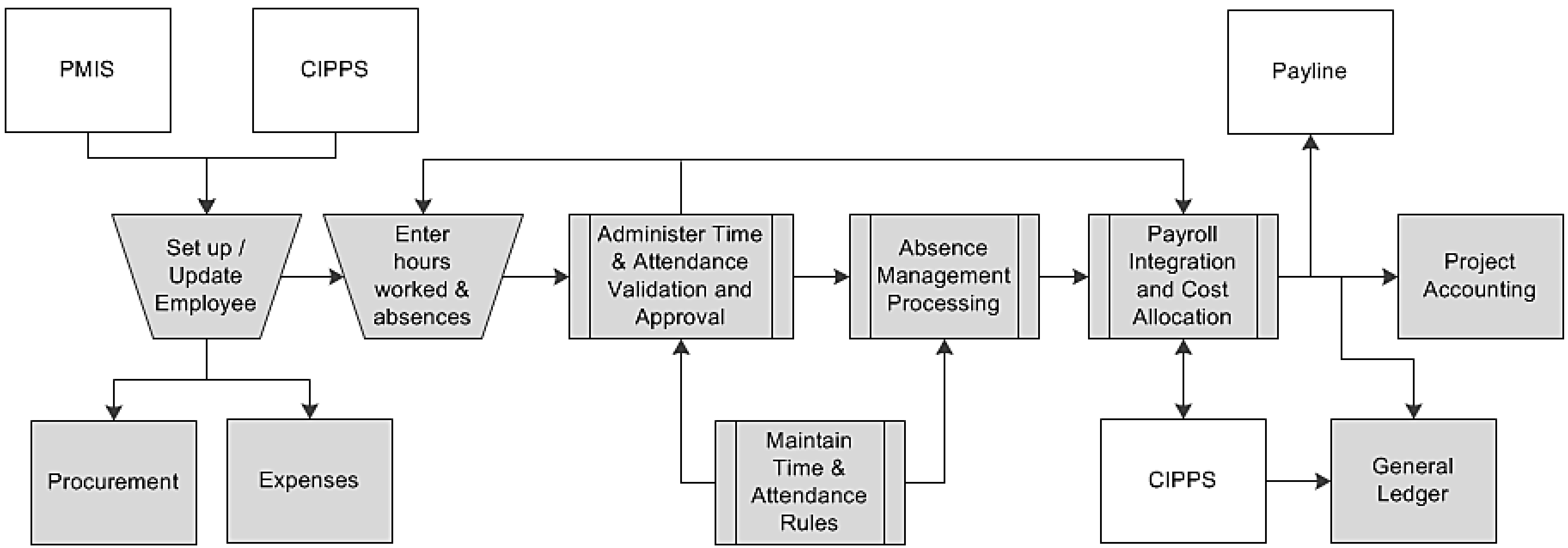
Payable Time: Reported hours worked and non-productive TRCs entered in the timesheet grid, located at the top of the **Timesheet** page, that has been successfully processed by Time Administration.

Reported Time (i.e. Absences): Time entered in the absence event grid section of the **Timesheet** page.

Time Administration: A batch process that validates submitted time, time entered in the timesheet grid on the Timesheet page, against time reporting rules and generates payable time. The process also generates exceptions.

Time and Attendance Process

The diagram provides an overview of Time and Attendance process.



Time and Attendance Process (continued)

Employee Setup:

- Employees are setup in Cardinal and this process includes:
  - Inputting job, personal, and position data
  - Enrolling an employee as a time reporter
  - Assigning work schedules
  - Enrolling employees in appropriate leave plans and leave benefits

Time and Attendance Capture:

- Time will be captured by employees after being set up as time reporters which includes:
  - Report time
  - Request absences
  - View and correct timesheet errors
  - View and run Time and Attendance reports

Time and Attendance Process (continued)

Administer Time and Attendance Validation and Approval

- Time validation is done through the Time Administration process. It also:
  - Generates payable time
  - Identifies exceptions
  - Processes payable time and sends it to Payroll

- Time approval is completed by supervisors who can:
  - Approve or deny time and absence requests
  - Complete the timesheet on behalf of the employee as well

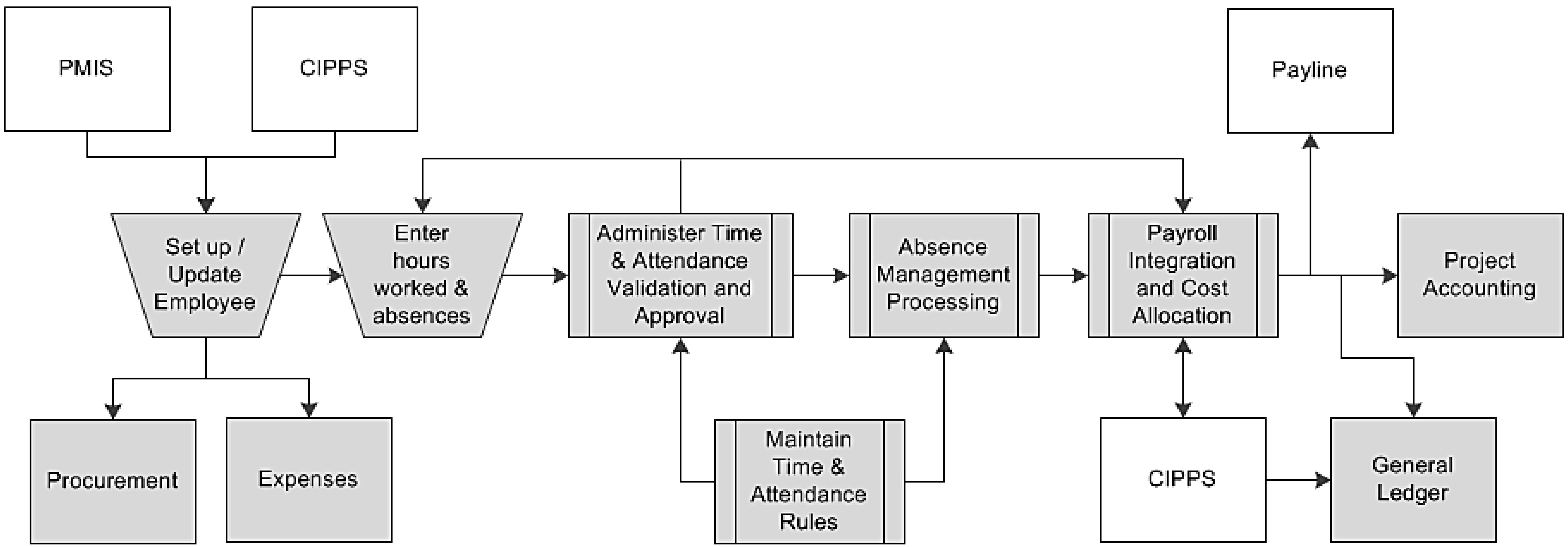
Payroll Integration and Cost Allocation

- Approved payable time is sent to Payroll to:
  - Generate pay

Time and Attendance Process Integration

Time and Attendance integrates with four other Cardinal modules, which include:

- Procurement
- Expenses
- Project Accounting
- General Ledger



Time and Attendance Process Integration (continued)

Procurement: Employee information that is created during the Time and Attendance Employee Setup process is used by the Small Purchase Charge Card Program in the Procurement module.

Expenses: Employee information that is created during the Time and Attendance Employee Setup process is used by the Expenses module in the Accounts Payable functional area to process employee travel and business expense reimbursements.

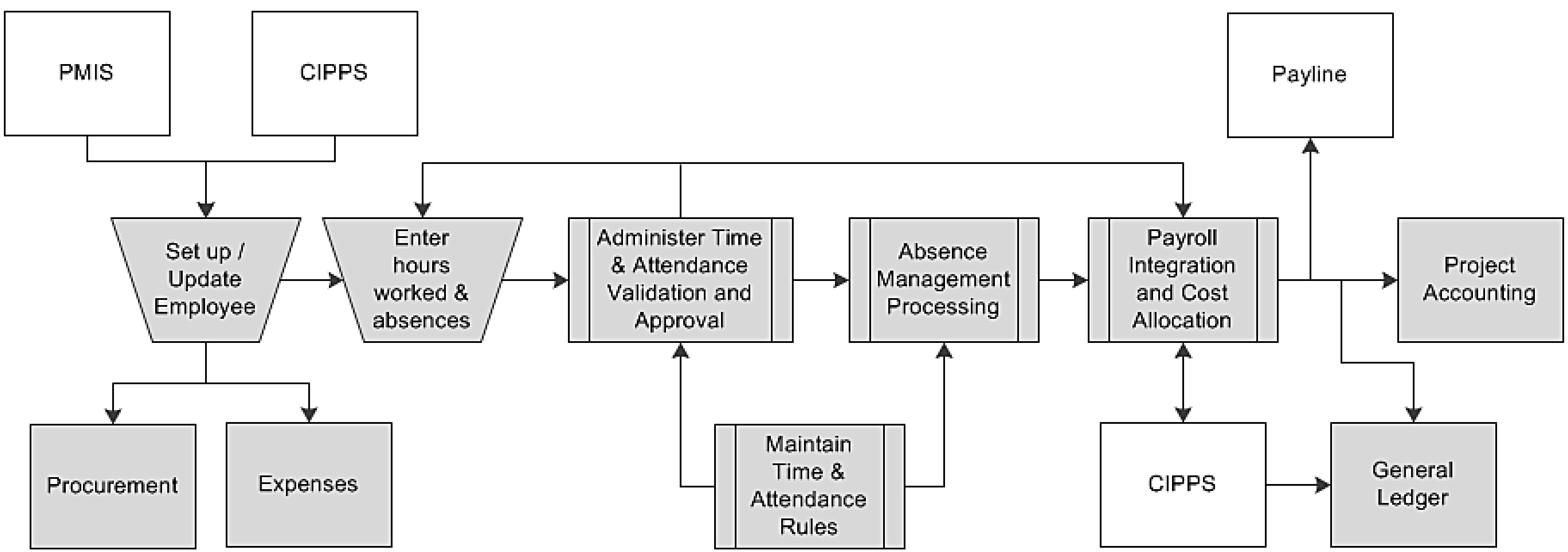
Project Accounting: Employee labor costs that are charged to projects are sent to Project Accounting when employee pay is distributed according to the charge distribution entered on employee timesheets.

General Ledger: Employee labor charges are sent to the General Ledger functional area when employee pay is distributed according to the charge distribution entered on employee timesheets.

Time and Attendance Process Interfaces

Time and Attendance also interfaces daily with several external systems:

- Personnel Management Information System (PMIS)
- Commonwealth Integrated Payroll & Personnel System (CIPPS)
- Payline



Time and Attendance Process Interfaces (continued)

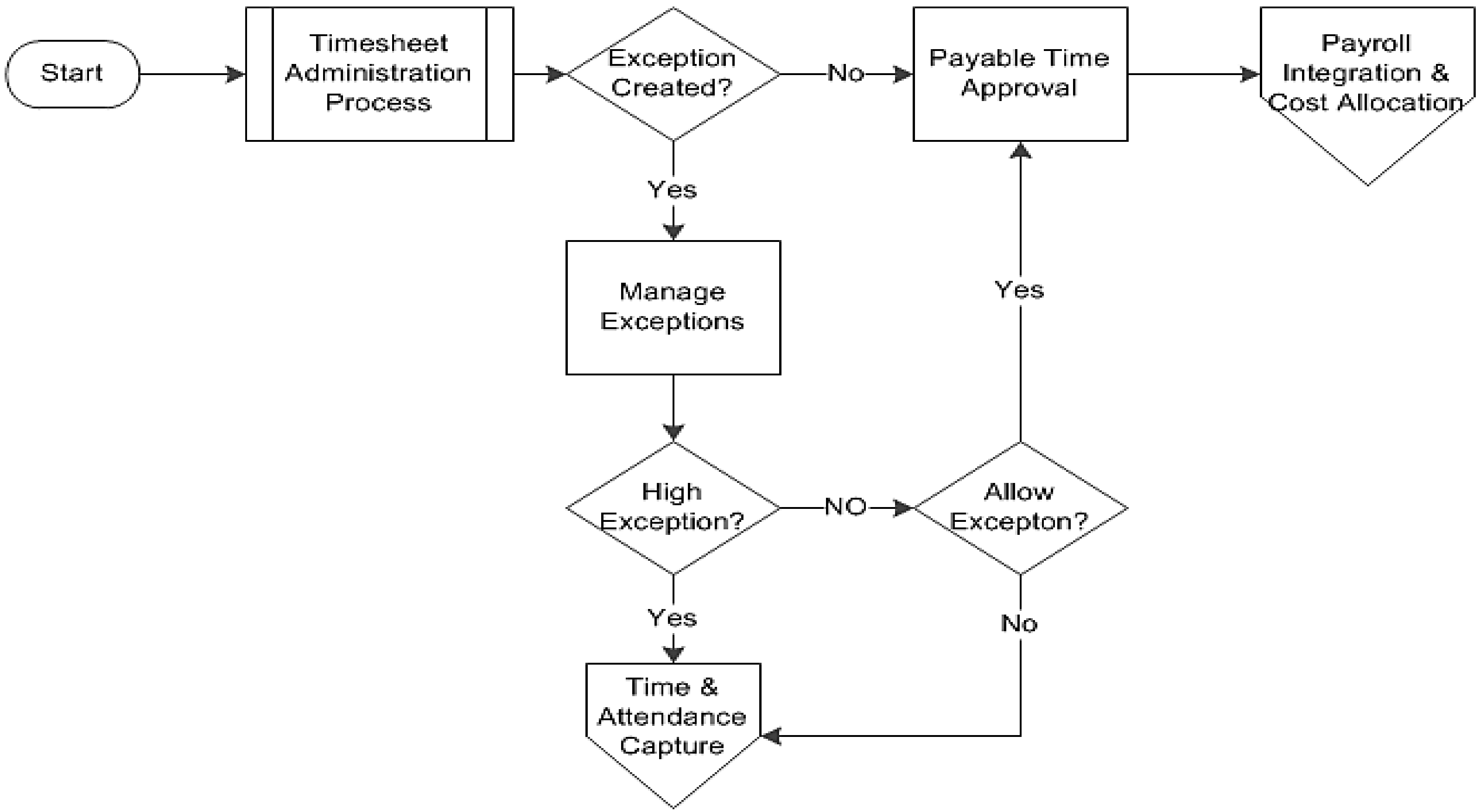
Commonwealth Integrated Payroll & Personnel System (CIPPS): Timesheet entries for hourly employees and overtime entries for both hourly and salaried employees are sent to CIPPS to create employee pay. Timesheet entries also identify how employee regular and overtime pay is charged.

Payline: Absence information is sent periodically to the Department of Accounts to allow employees to view their absence balances via Payline.

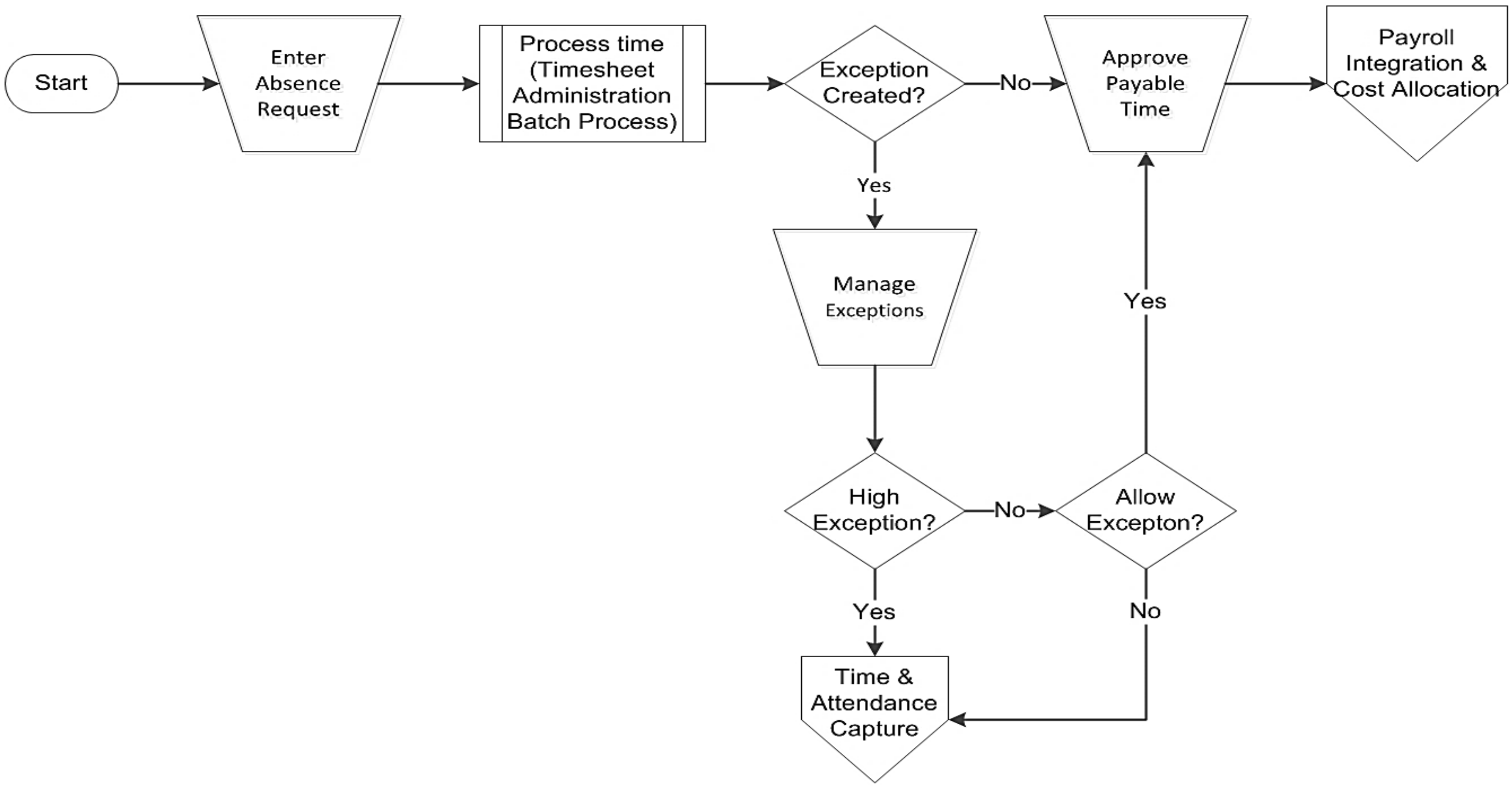
Personnel Management Information System (PMIS): New and updated employee and position information is first entered into PMIS. PMIS then sends the information to Cardinal.

Payable Time Approval Process Flow

The diagram on this page shows the Time and Attendance approval process for Payable Time.



Time Approval Process



Click on image to return

Flowchart Key

Step Description	Depicts a process step or interface.
Batch Process	Specifies a batch process.
Manual Operation	Depicts a process step that is preformed manually.
Decision Outcome	Defines the possible outcomes of a decision or analysis that took place in a step immediately preceding.
Entity Name	Represents an entity (person, organization, etc.).
Start	Indicates point at which the process begins. Does not represent any activity.
End	Indicates point at which the process ends. Does not represent any activity.
Document	Depicts a document of any kind, either electronic or hard copy.
X	Indicates an on-page or intra process connector. Used to avoid complex overlapping connector lines or to continue a process on a subsequent page.
Step/ Process	Connects steps between business processes.